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ABSTRACT

The guide for coordinators of cooperative office education in Virginia, the work of 138 coordinators participating in 36 in-service workshops, describes specific steps for developing and using training plans in cooperative office education. Five short chapters discuss the what and why of training plans, development and use of model training guides, setting the stage for training plan development, procedures for developing training plans, and using training plans. The bulk of the guide consists of four appendixes: a completed training plan (with student's, training sponsor's and coordinator's copies) which describes experiences and training needed (both on-the-job and in class), on-the-job evaluation, and individual related instruction; model training guides giving a job description and experiences and training needed for the jobs of bank clerk, bookkeeper (accounting clerk), cashier, clerk-typist, duplicating machine operator, file clerk, general office clerk, key punch operator, legal secretary, mail clerk, medical secretary, receptionist, secretary, stenographer, and transcribing machine operator; a sample training agreement; individual training plans developed by the Virginia Cooperative Office Education Coordinators for the jobs of accounting clerk, clerk-typist, file clerk, general office clerk, legal secretary, mail clerk, medical secretary, and secretary; and a list of workshop participants. (JR)

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Training Plans for Cooperative Office Education

A Guide

U.S. DEPARTMENT OF HEALTH
EDUCATION & WELFARE
NATIONAL INSTITUTE OF
EDUCATION

CE009056

BUSINESS EDUCATION SERVICE • DIVISION OF VOCATIONAL EDUCATION
STATE DEPARTMENT OF EDUCATION • RICHMOND, VIRGINIA • AUGUST 1974

FOREWORD

Cooperative Office Education is the capstone of a high school student's training program in office occupations. The program coordinates classroom study and on-the-job training; each complements the other. Cooperative Office Education students' schedules are arranged so that they attend classes part of the day and are employed in offices during the other part of the day. The office instruction is an extension of the classroom instruction.

The cooperative plan of Business Education instruction uses a real office as a "school laboratory" in which occupational competencies are developed through supervised occupational experiences while related instruction is given in school. Cooperative education is a method of instruction which involves three parties--the student-learner, the training sponsor, and the teacher-coordinator.

Woodrow W. Wilkerson
Superintendent of Public Instruction

George S. Orr, Jr., Director
Division of Vocational Education

STATEMENT OF PURPOSES

One of the most important steps in the proper establishment of a training station is that of preparing a written plan of training.

The primary purpose of the training plan is to organize the instruction and to correlate classroom learning and on-the-job training. The student-learner, the training sponsor, and the teacher-coordinator together determine the specific learning experiences to be provided on the job and the specific related classroom instruction. Training plans can be the approach of providing the basis for a sound program of cooperative education in Virginia's secondary schools.

While vocational educators have recommended the use of job training plans for many years, this is the first time that a publication has outlined the specific steps for developing training plans. It is hoped that the suggestions in this guide will strengthen the Cooperative Office Education programs in Virginia and provide direction for coordinators of all cooperative education.

Carl E. Jorgensen
State Supervisor
Business Education Service

INTRODUCTION

This publication is intended to serve as a guide for coordinators of cooperative office education in Virginia's public secondary schools. The guide became a reality as a result of the work done by 138 coordinators through thirty-six in-service education workshops. (See Appendix E for the workshop participants). Each coordinator participated in three workshops over a six-month period extending from October, 1973 to March, 1974. We commend those who helped to make this a most successful project.

The objectives accomplished through these workshops were as follows:

1. Development of a set of procedures for designing and using training plans.
2. Development of model training guides for fifteen job titles.
3. Development--from the model training guides-- of individualized training plans for one student enrolled in cooperative office education.
4. Use of individualized training plans in guiding students toward meeting their career objectives.
5. Adjustment and revision of individualized training plans as necessary during and after their use.

Carefully developed training plans offer benefits which far outweigh the time and effort expended in their development. The coordinator must know how to use training plans effectively if the effort exerted in their development is to be worthwhile. Training plans should be continuously evaluated by student-learners, training sponsors, and the coordinator to determine their effectiveness and whether changes should be made. We hope this guide is sufficiently specific in content to help all coordinators develop and use training plans.

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CHAPTER I

THE WHAT AND WHY OF TRAINING PLANS

What is a Training Plan?

A training plan is a written procedure created to identify the proposed manner in which the occupational goal of a student-learner is to be attained. Progressive experiences and learning activities included in a training plan are identified by analyzing the skills, knowledges, and attitudes necessary for successful initial employment and for advancement in the student-learner's chosen occupational field. Once identified, experiences and learning activities are listed on a suitable form in a logical teaching sequence. The training plan form usually provides a way to indicate whether training is to take place on the job, in the classroom, or in both places. The training plan form may also contain space for periodic evaluation.

The development of the training plan, while primarily the responsibility of the coordinator, should be a joint effort of the coordinator, the employer or designated training sponsor, and the student-learner. Each should receive a copy of the completed plan.

It is suggested that the training plan of a fictional student, Janet Lynne Hardin, be examined at this time. Three copies of the plan are presented in Appendix A. The student's copy appears on pages 22 through 28, the training sponsor's copy on pages 29 through 35, and the coordinators' copy on pages 36 through 42.

Why Use Training Plans?

Three essential elements of cooperative education are:

1. Basic in-class instruction in an occupational cluster.
2. On-job training in a specific job within the occupational cluster.
3. In-class instruction related to the specific on-job training.

These three elements must not be viewed separately; they should be combined for each student-learner into a whole learning experience. Correlation is a term often used to stress this concept.

Correlation is present in a cooperative program when on-job and in-class instruction are related to the student-learner's specific job and to his occupational goals. It cannot be achieved unless the sequence of instruction for each student-learner is determined by job needs and occupational goals rather than by the organization of a textbook or other organizational patterns. It requires that a portion of in-class time be devoted to individualized instruction to equip each student-learner with the skills, knowledges, and attitudes unique to his specific job.

Correlation will not "just happen;" it is the coordinator's responsibility to insure its presence in cooperative education. It is difficult to imagine how correlation can be attained without individualized training plans to set forth the manner in which it is to be achieved.

Advantages of Using Training Plans

Carefully developed training plans, used properly by students, training sponsors, and coordinators, offer benefits which far outweigh the time and effort expended in their development. Some of the advantages of using training plans follow.

Training plans enable the student to:

1. Identify training objectives and what needs to be done to achieve them.

2. Perceive the relevance of in-school learnings because of the emphasis on the relationship between in-school and on-job activities.

3. Generalize specific job experiences to jobs in the occupational cluster within which the specific job belongs.

4. Evaluate the quality of in-class and on-job training.

5. Know when he will be asked to apply basic skills and knowledges on the job, thereby furnishing the motivation he may need to learn them.

Training plans enable the employer to:

1. Become a more effective teacher by identifying what needs to be taught.

2. Obtain training plans which may be usable by full-time workers in his business.

3. Realize that he is part of a systematic, educationally sound program which is beneficial to him and to the business community.

Training plans enable the coordinator to:

1. Achieve the correlation that is essential in an effective cooperative program.

2. Compare proposed training with actual job practice.

3. Evaluate the progress of students and the value of training stations.

4. Make certain that students are progressing toward occupational goals.

5. Better understand job requirements and specifications.

CHAPTER II

DEVELOPMENT AND USE OF MODEL TRAINING GUIDES

Task and job analysis are necessary in order to identify progressive experiences and learning activities included in training plans. While every teacher-coordinator should be able to apply the basic principles of task analysis, it does not seem reasonable to expect a detailed analysis of every cooperative student's job. Fortunately, this is not necessary if full utilization is made of research that has already been completed.

In recent years numerous studies, some national in scope, have been completed which identify tasks performed in specific office jobs. These task inventories have been translated into competency lists which describe skills, knowledges, and attitudes needed for entry and advancement in various office jobs. The Cooperative Office Education coordinators in Virginia have utilized these lists, available curriculum guides, and their own personal knowledge of job requirements to develop Model Training Guides for 15 job titles. These training guides are included in Appendix B.

> An analysis of reports submitted to the Business Education Service, Virginia State Department of Education, by coordinators during the past 5 years reveals that more than 90 per cent of all jobs held by Cooperative Office Education students were in the 15 job titles for which Model Training Guides were developed.

Model Training Guides are intended to indicate the range of possible activities and experiences for specific job titles. When used as check sheets, they can eliminate much of the burden of task analysis. Activities and experiences available at the training station can be checked off, thereby allowing the coordinator to concentrate on those tasks unique to the specific job.

OTHER USES OF MODEL TRAINING GUIDES

In addition to their value in training plan development, Model Training Guides may be used:

1. As aids in guidance by enabling students to examine what is expected of them in various jobs.
2. To help identify common knowledges needed in occupational clusters.
3. As standards against which to evaluate potential training stations.
4. To identify gaps in training when available training stations offer limited experiences.
5. As aids in training station development by identifying areas in which on-job experiences can be expanded.
6. To identify new activities and experiences which can be added to a student-learner's individualized plan as he progresses.

Training plan development is, of course, much more than the act of copying a model onto a training plan form. Model Training Guides make no provision for individual differences among student-learners, not do they reflect the unique aspects of each training station.

CHAPTER III

SETTING THE STAGE FOR TRAINING PLAN DEVELOPMENT

The following steps should be completed before training plan development begins:

1. Determine Occupational Goals of Student-Learners
2. Identify Skills and Knowledges Needed by Student-Learners to Secure Employment and to Advance in Their Occupational Fields
3. Identify the Types of Training Stations Needed to Meet Student-Learners' Needs
4. Find and Develop Training Stations
5. Execute Training Agreements

Determine Occupational Goals of Student-Learners

Cooperative education students should, with the assistance of the coordinator, guidance counselors, parents, and other teachers, identify occupational goals. While it is true that a student's goal may change, a current occupational objective must be identified before educational plans can be developed.

Activities and experiences planned for cooperative education students should be directly related to occupational goals. It is, therefore, essential that goals be realistic and attainable. It is also imperative that planning reflect an awareness that career objectives may change. The cooperative education program should never force an individual into a dead-end job; rather, it should insure the broad education needed for flexibility and adaptability.

Identify Skills and Knowledges Needed by Student-Learners to Secure Employment and to Advance in Their Occupational Fields

The coordinator should remember that a primary objective in cooperative education is to provide broad training which will enable each student to acquire the skills and knowledges needed to obtain any number of jobs within an occupational cluster. He should, therefore, identify the cluster of occupations to which the goal of each student belongs and then list the competencies necessary for employment and advancement in that occupational cluster. The resulting list should comprise the elements of the basic educational plan.

In most Virginia secondary schools there are no separate related classes exclusively for Cooperative Office Education students. They enter one of several integrated block programs, depending upon their career objectives.

At the present time, block programs have been developed for the following occupational clusters:

1. Stenographic and Related Occupations
2. Typewriting and Related Occupations
3. Clerical Accounting and Related Occupations
4. Filing and Related Occupations
5. Data Processing and Related Occupations
6. Office Duplication Occupations--Reprographics

Units of instruction and suggested curriculum patterns have been developed for each occupational cluster to indicate ways in which the instructional units within each cluster can be arranged into desirable training programs.[1]

When a Cooperative Office Education student enters a block program, it is expected that he will receive basic instruction required of all students in the program. The teacher of the block acts as the Cooperative Office Education student's teacher-coordinator, thereby accepting the responsibility for providing individualized job-related instruction, training plan development, and correlation of in-class and on-job training.

[1]See Suggested Curriculum Patterns for Office Occupational Education, (Richmond: Business Education Service, Virginia State Department of Education), 1973.

Identify the Types of Training Stations Needed to Meet Student-Learners' Needs

The coordinator should answer the following question about each of his cooperative education students:

> Now that I know what "Janet Lynne" wants to become, and now that I have identified what she needs to learn in order to reach her goals, in what types of businesses is she likely to receive the training and experiences she needs?

The answer to the above question should result in the identification of a number of possible training stations for each student. Properly developed and used, the resulting list should enable the coordinator to systematically seek training stations. To start on one end of Main Street, pound on every door, and then repeat the process on the other side of the street is a poor practice and is an unnecessary waste of time.

This step presupposes the completion of occupational surveys. Data from these surveys should enable the coordinator to identify potential training stations.[1] Surveys are necessary not only during the initialization of the cooperative program, but they should be conducted at periodic intervals in an on-going program in order to detect changes, to ascertain employment trends, and to identify potential new training stations.

Find and Develop Training Stations

The coordinator should know what types of training stations he is looking for when he begins his search, and the quest should continue until suitable stations are found. An employer who is willing to "provide work" but who is unable or unwilling to provide a learning laboratory, close supervision, and

---

[1]Specific objectives to be accomplished when conducting surveys, suggested methods, and a sample survey form are presented in Teaching Guide for Cooperative Office Education (Richmond: Business Education Service, Virginia State Department of Education), 1970, pp. 9-12.

the experiences needed by the cooperative student should not be selected to participate in the cooperative education program.

This does not mean that a station should be rejected if training potential is not readily apparent. If there is work to be done, the coordinator has an "entree" into the business. The coordinator must remember, however, that his responsibility does not end when he finds a job for a student-learner. Once found, a job must be developed into a training situation which will meet the needs of the student-learner.

Mason and Haines vividly illustrate the importance of job development. Among their many pertinent comments are the following:

> Job development, the act of creating jobs, is an aggressive, not a passive function and must be distinguished from the mere matching of the trainee to an existing part-time job. Certainly it is far more than the filling of employer requests for "someone to work part-time." . . . effective programs cannot exist with so-called "desk coordinators" who are "telephone order-takers" accepting employer requests at the convenience of the employer and fitting students to those requirements.[1]

Each employer should understand that when he agrees to participate in the cooperative program he is making a commitment to work with the coordinator in the creation of a learning laboratory in which a particular student can apply classroom learnings and develop new skills. The commitment should not be sought until the employer understands the purposes of the cooperative program and his responsibilities in helping accomplish those purposes. Whether the coordinator is able to obtain this commitment is dependent upon his ability to convince the employer of the merits of the cooperative education program.

The coordinator must, of course, use tact, good judgment, salesmanship, and persuasion in his efforts to convince the employer that the responsibilities

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[1]Ralph E. Mason and Peter G. Haines, Cooperative Occupational Education 2nd ed. (Danville, Ill.: Interstate Publishers, Inc.), 1972, pp. 210-211.

he will be asked to assume are fair and reasonable. The coordinator must assure the employer that an unreasonable amount of his time will not be required and that the cooperative program is designed to benefit him as well as the student-learner.

Execute Training Agreements

After committment to provide a training station has been obtained, the employer should select a student-learner from among those the coordinator believes will meet their occupational goals at the training station. A training agreement, similar to the one in Appendix C, should then be concluded. The agreement should identify the responsibilities of the student, the student's parents, the employer, and the coordinator. The coordinator's copy of the agreement should be placed in the student-learner's permanent records.

Please note that the Sample Training Agreement in Appendix C specifies the following responsibilities related to training plans:

> The student-learner agrees to furnish the teacher-coordinator with necessary information about his training plan and to complete promptly all necessary reports. He also agrees to consult the teacher-coordinator about any difficulties arising at the training station or related to his training plan.
>
> The training station agrees to cooperate in the development of a training plan and to follow the plan until it is mutually agreed to change it.
>
> The teacher-coordinator agrees to assume responsibility for the initiation and development of a training plan and to insure that it is followed until it is mutually agreed to change it.

CHAPTER IV

PROCEDURES FOR DEVELOPING TRAINING PLANS

Introduction

The procedures described in this chapter have been developed and field tested by Cooperative Office Education coordinators throughout Virginia. Training plan development usually requires a series of meetings with the employer. It is probable that in many instances the training plan will not be finalized until a number of weeks after the student-learner has been employed.

> Throughout the procedures "training sponsor" is used to identify the person who will work with the coordinator in the development of the training plan and in the teaching and supervison of the student-learner. The coordinator's initial contact in the business should be with a high-level decision-maker, who may appoint a front-line supervisor or a rank-and-file employee as the training sponsor.

Developing the Training Station Job Description

1. When you visit the training station for the purpose of developing a description of the student-learner's job, take the following with you:

    A. Sample Individualized Plan (See Appendix A)

        1) Student's Copy
        2) Training Sponsor's Copy
        3) Coordinator's Copy

    B. Model Training Guides (See Appendix B)

    C. Notebook in which to record observations

2. List the duties and responsibilities the student-learner will be expected to discharge as the training sponsor describes them to you.

3. Examine your list and attempt to identify the work by job title.

4. Ask the training sponsor if he will, as an aid in identifying duties and responsibilities he may have forgotten to mention, examine a Model Training Guide corresponding to the job being described. Add to the job description you are developing as necessary.

In some instances student-learners are placed in positions which do not correspond to specific job titles. In these situations it may be necessary to refer to several Model Training Guides.

If you believe the job being described offers only limited experiences, you should encourage the training sponsor to include some of the items shown on the Model Training Guide(s).

5. Request the training sponsor to aid you in the development of an individualized training plan for the student he has selected.

Let the training sponsor inspect your sample individualized plans. These samples depict what training plans look like after they have been in use for a span of time.

Explain that you and the student-learner will make handwritten comments on your copies of the plan.

Emphasize to the training sponsor that he may use his copy of the training plan in the manner he believes best, but you should suggest ways in which he may use the plan most effectively. (See Chapter V)

Stress the point that you will do most of the work. The training sponsor's primary role will be that of the consultant and evaluator of the completed plan.

Explain why it is necessary to develop a training plan for the student-learner. (See Chapter I)

Emphasize how a training plan will benefit the employer, student, and coordinator. (See Chapter I)

Stress the fact that the training plan is not intended to be a contract and that it may be modified as training proceeds.

6. When you are satisfied that you have a complete description of the job, tell the training sponsor that you will return to school and develop a training plan for his approval.

Developing the Student-Learner's Individualized Training Plan

1. Three factors must be considered in the development of an individualized training plan:

   A. Student--his occupational goals, needs, strengths, weaknesses

   B. Job Description--the job as it actually exists

   C. Model Training Guides--the range of possible activities and experiences

   Student. The plan must be designed to help the student-learner meet his occupational goal. It must also reflect an awareness of the student-learner's special talents, strengths, and weaknesses. The coordinator must be prepared to ask the employer to modify the job by adding new experiences and omitting others in order to meet the special needs of the student.

   Job Description. The types of experiences available at the training station puts constraints upon the development of the individualized training plan. No matter how carefully the coordinator selects the training station, it is doubtful that he will find one that affords all the opportunities needed by a student-learner.

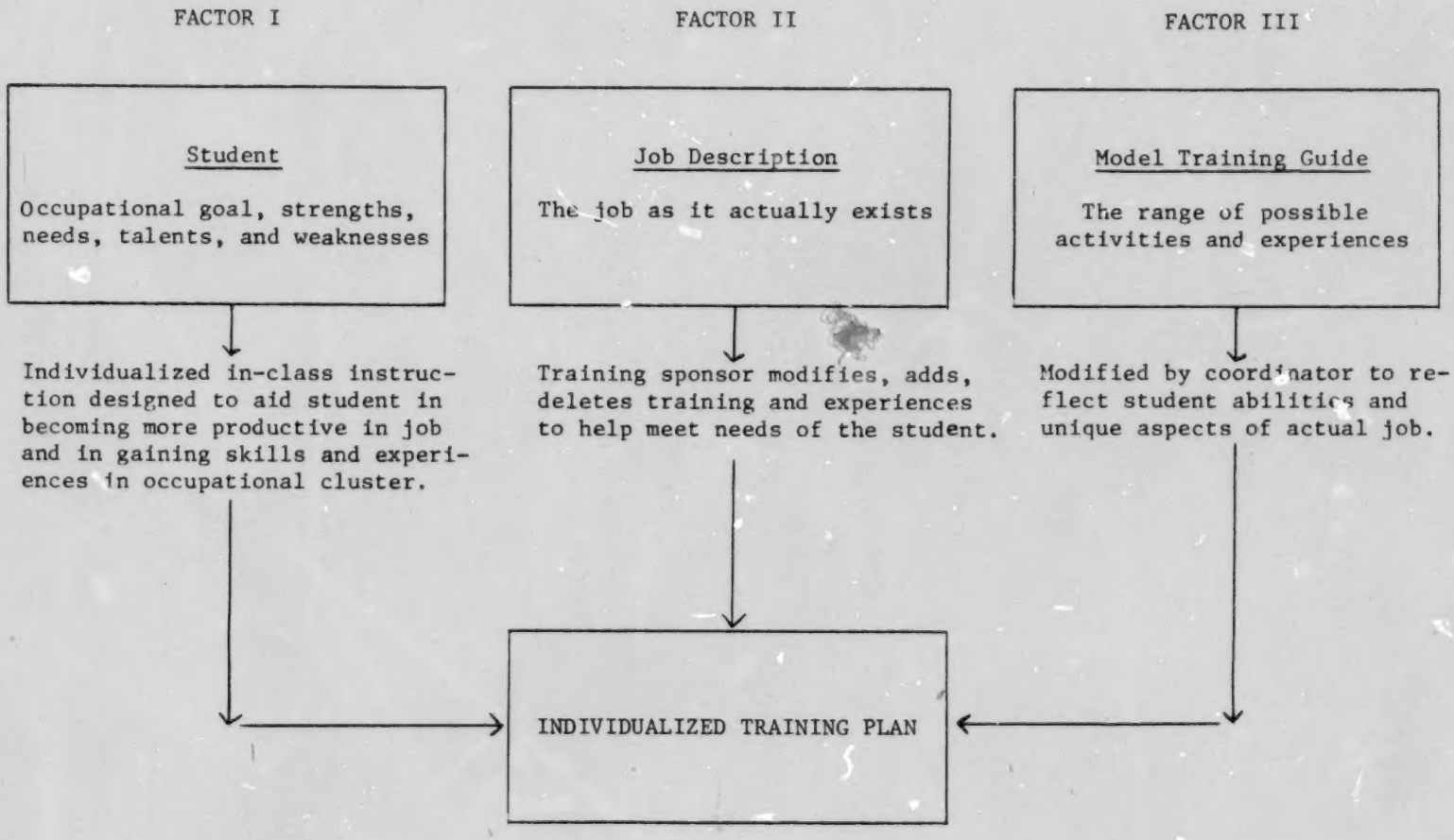
   Model Training Guides. The coordinator should compare the actual job with a model of what he believe is the best possible training experience for the student-learner. A gap usually exists between the training and experience a student-learner needs and what the training sponsor is able or willing to provide. It is the responsibility of the coordinator to narrow this gap. He may do so by convincing the employer to modify the job where possible and by minimizing remaining training deficiences with additional classroom training.

The quality of the individualized training plan depends upon the coordinator's ability to deal with these three factors.

An illustration of the training plan developmental process is shown on the following page.

ILLUSTRATION

TRAINING PLAN DEVELOPMENTAL PROCESS


FACTOR I
FACTOR II
FACTOR III
Student
Occupational goal, strengths, needs, talents, and weaknesses
Job Description
The job as it actually exists
Model Training Guide
The range of possible activities and experiences
Individualized in-class instruction designed to aid student in becoming more productive in job and in gaining skills and experiences in occupational cluster.
Training sponsor modifies, adds, deletes training and experiences to help meet needs of the student.
Modified by coordinator to reflect student abilities and unique aspects of actual job.
INDIVIDUALIZED TRAINING PLAN

2. Identify and sequence training plan activities. The sequence depends upon the organization of on-job activities and in-class instruction.

3. Enter training activities on training plan form.

> Do not assign activities to "On Job" and "In Class" categories. This should be done in conference with the training sponsor.

4. Reveiw the completed training plan with the student. Does he agree with it? Does he understand it? Use his input to modify the plan if necessary. Make the student feel that he has some part in the development of the plan.

5. Ask the training sponsor to review the plan. Explain that you have developed what you believe will be a meaningful experience for the student-learner. Does he agree that the plan is workable? Does he feel that it is comprehensive? Make changes if necessary.

> You have probably added training and experiences that the training sponsor had no intention of providing. Explain that you did so in order to fill in gaps in training. This may be the time to ask the training sponsor to provide more training. Something like this may occur:
>
> You: "This isn't a part of the job as you described it to me, but I believe it is needed. Can you provide any training in this area? If not, I'll try to do so in class."
>
> Training Sponsor: "Wait a minute--perhaps I can do something. Let's add it to the 'On Job' category of the training plan."

6. With the approval and concurrence of the training sponsor, assign experiences and activities to "On Job" and "In Class" categories.

7. Prepare three copies of the final training plan. The coordinator should emphasize the importance he places upon the plan by placing the copies of the training sponsor and student in attractive folders.

8. The training sponsor and coordinator should explain, review, and discuss the plan with the student. All parties should understand the plan.

CHAPTER V

USING TRAINING PLANS

Introduction

The coordinator must know how to use training plans effectively if the effort exerted in their development is to be worthwhile. And, of course, a plan will gather dust in a student-learner's notebook and on a training sponsor's desk if the coordinator fails to explain to each of them how it can be used to aid in the achievement of the objectives of the cooperative experience. This chapter suggests ways in which the training plan can be used by the student-learner, the training sponsor, and the coordinator.

How the Student-Learner Uses the Training Plan

Each student-learner should be taught to continuously evaluate not only the quality of in-class and on-job training set forth in his training plan, but he should also learn to evaluate the plan itself. He should report his evaluation by making appropriate remarks in the "On-Job Evaluation" and "Individual Related Instruction" columns of his training plan.

The student-learner should make judgment about the strengths and weaknesses of his training plan. If he believes components of the plan should be deleted, expanded, modified, or rearranged, he should make notations in the "On-Job Evaluation" or "Individual Related Instruction" columns, depending upon whether he believes on-job or in-class training should be adjusted. He should also give reasons for any changes he suggests. For example, if he feels

that he needs additional experiences, he should identify them and tell why they are needed.

The "On-Job Evaluation" and "Individual Related Instruction" columns of the student-learner's training plan should also be used by the student-learner to record his feelings about the quality of the on-job and in-class training he receives. He should be encouraged to suggest ways in which he believes his training can be improved.

The student-learner's training plan may also be used to report situations that may require coordinator intervention. If, for example, the student-learner feels that the training plan is not being followed, he should make a notation in the "On-Job Evaluation" column.

Student-learners should be required to submit their training plans to the coordinator for examination at regular intervals. Comments student-learners have written upon their plans should be discussed and problems should be resolved.

At the end of the school year, each student-learner should be asked to make a final evaluation of his training plan. This will furnish valuable data for the coordinator in the preparation of future plans.

> See the student-learner's copy of the training plan of "Janet Lynne Hardin," Appendix A, pages 22 through 28, for illustrations of many of the points discussed above.

How the Training Sponsor Uses the Training Plan

The training sponsor should have considerable freedom in how he uses his copy of the training plan; nevertheless, the coordinator should offer suggestions to help him use it effectively.

> A good way to do this is to let the training sponsor examine a completed plan as you explain its use. See the training sponsor's copy of "Janet Lynne Hardin's plan, Appendix A, pages 29 through 35.

The training sponsor will have a record of points he may wish to discuss during coordination visits if he enters his evaluation of the performance of the student-learner in the "On-Job Evaluation" columns of his copy of the training plan. He should also be encouraged to record his impressions about the strengths and weaknesses of the plan, as well as his suggestions about possible modifications.

The "Individual Related Instruction" columns of the training plan may be used by the training sponsor to suggest instruction that may be beneficial to the student-learner. He may suggest remedial instruction, advanced preparation for future training, and other activities he believes will be helpful to the student-learner.

How the Coordinator Uses the Training Plan

The coordinator should always take his copy of the training plan with him on coordination visits. He should record the comments of the training sponsor in the "On-Job Evaluation" and "Individual Related Instruction" columns of his copy of the training plan. After the conference with the training sponsor, he should review his recorded comments and make additional entries if necessary.

> The coordinator's copy of the training plan of "Janet Lynne Hardin," Appendix A, pages 36 through 42, should be examined for illustrations of comments the coordinator may enter in the "On-Job Evaluation" and "Individual Related Instruction" columns.

Periodic conferences with student-learners should be scheduled for the purpose of reviewing and evaluating training plans. Student-learners should bring their copies of the training plans to these conferences. Their comments should be compared with those of the coordinator and training problems should be resolved.

At the end of the school year, the coordinator's copy of each training plan should be filed for future use. If a new student is placed in a training station in a job for which a plan has been developed, the coordinator should be able to adjust the previously developed plan to meet the needs of the new trainee.

Summary

Training plans should be continuously evaluated by student-learners, training sponsors, and the coordinator to determine their effectiveness and whether changes should be made.

Modifications in training plans may be desirable for many reasons. Some of the experiences and activities in a student-learner's plan may have to be deleted or modified because he is not progressing as well as anticipated. Changing business conditions may necessitate modifications in the sequence and/or content of on-job experiences and activities. New experiences and activities should be added to the plan of a student-learner who meets objectives sooner than expected or who has the ability to accomplish more than might have been originally planned for him.

See Appendix A for illustrations of how modifications may be entered in a training plan.

All three parties--student-learner, training sponsor, and coordinator--should agree upon any changes made in a training plan. While some changes are inevitable, continuous adjustment and modification is an indication that the original plan was not well conceived.

APPENDIX A

A Completed Training Plan

1. Student's copy
2. Training sponsor's copy
3. Coordinator's copy

INDIVIDUALIZED TRAINING PLAN

Copy: Student

Name Janet Lynne Hardin Job Title General Office Clerk

Firm United States Stores--Walnut Hill Branch Training Sponsor Mr. Clarence McClurd

Student's Career Objective General Office Clerk in large retail firm

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Receives brief overview of company--organization, role in community, services, types of customers served.	X		3/14 - Mr McClurd didn't appear much about business Done me a favor of manuals one used me if I had any questions he'd get back to me	I need help understanding company manuals -- especially organization charts.
2. Receives basic salary information--computation of pay, taxes, deductions.	X			
3. Receives explanation of policies regarding breaks, holidays, vacations, promotions.	X			
4. Receives information regarding job efficiency--following directions, asking questions, following company practices, doing work on time, maintaining high standards, checking facts and figures.	X	X	4/25 - I get out 9 seconds too late on M, W, and F to catch right bus	Can my responsibilities be changed?
5. Receives information regarding importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
6. Receives information about company image--dress, grooming voice, posture, quality of work.	X	X	9/30 – I don't really see anything wrong with my clothes. I wear what everyone else at school wears.	How can I satisfy Mr. McClure about what I wear instead changing my entire wardrobe! I can't afford to do that!
7. Receives explanation of work flow within office and importance of student's job to total office output.	X			
8. Meets supervisory personnel and office staff.	X			
ADDITIONS AS TRAINING REQUIRES				
Receptionist:				
1. Greets visitors.	X	X	10/20 – I'm scared to death when someone comes to visit. Not sure what to do.	I need help on spelling people, making intro sentences, etc.
2. Refers callers to appropriate person or makes appointments for them.	X		11/3 – Receptionist visit very helpful. Still need more comfortable	you need to spend more time training me how to handle angry callers.
3. Handles inquiries or requests whenever appropriate.	X		1/8 – I failed to record two appointments. Mr. McClure didn't tell me about them, but I was afraid to correct him.	What should we do when the boss is wrong?
ADDITIONS AS TRAINING REQUIRES				
4 Keep Mr. McClure's appointment book (1/13)	X	X		
Typewriting:				
1. Types form letters, memoranda, envelopes, cards, and labels.	X	X	9/14 – Bad day today. Worrying about math test and messed up typing. Wish I could drop other school subject.	

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
2. Types letters and reports from rough drafts and corrected copies.	X	X	10/1 - Got complimented on improvement. Mr. McCloud suggests that I learn how to set margins by estimating.	Margin setting chart you gave us not used by other girls in office. Can you teach me how to set margins by just looking at copy?
3. Types business forms--orders, bills, checks, telegrams, lists, statements, inventory cards.	X	X	11/8 Nobody told me I had to check figures before typing. I just type what I see.	You showed us how to type problems with errors and figures in to find them
4. Types stencils, masters, and offset mats.	X	X		
5. Cleans and maintains typewriter--includes changing of carbon and fabric ribbons.	X	X		
ADDITIONS AS TRAINING REQUIRES			11/11 - Mr. McCloud says I'm doing real well. I enjoy my work here	
Filing:				
1. Receives explanation of structure and use of filing systems in the office.	X		2/5 New filing system is working now what we studied. I may never learn it!	Maybe you could come down and work the system over then help me!
2. Reads, codes, and sorts material to be filed.	X	X	2/15 I'm doing better, but I still need more help.	Could you ask Mr. McCloud to explain it to me again? I didn't listen too carefully when he explained it before.
3. Files: a. incoming correspondence, orders, invoices, price lists, and other material b. copies of outgoing correspondence	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
4. Maintains follow-up records.	X	X	3/18 - I'm finally getting the hang of it. Wish I could retrieve a little faster	Could I remain on Tabby Experience a little longer? I believe it will help me
5. Traces missing file data.	X	X		
6. Replaces worn folders, labels, and index cards.	X			
7. Prepares new file folders when instructed to do so.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Handling Mail:				
1. Handles oncoming mail:	X	X	10/4 - I don't know as much about the classes of mail as I should -- especially when one class is better than another.	Our Mail Unit doesn't go deep enough. Could we spend more time on choosing the correct class of mail?
a. time stamps, sorts, distributes				
b. replies to routine mail				
2. Prepares outgoing mail:	X	X	10/18 - Had to wrap packages for mailing. What a mess I made	We should spend some time in class on how to wrap packages for mailing.
a. collects outgoing mail				
b. addresses envelopes and packages by typing, handwriting, or using addressograph machine				
c. stuffs envelopes by hand or with machine				
d. wraps packages				
e. computes and affixes postage manually or with postage meter				
f. keeps record of postage used				
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Telephone:			10/30 - No problems I feel that I'm doing well in this area	Our Cathy-operated telephones and the simulations you have developed have been very helpful. Everyone in class should complete these simulations
1. Places local and long distance calls.	X	X		
2. Records and delivers telephone messages.	X	X		
3. Routes calls to persons within the organization.	X			
4. Secures information via telephone.	X		2/5 - Everything going well	
5. Takes orders for merchandise or services.	X			
6. Answers telephone inquiries.	X			
ADDITIONS AS TRAINING REQUIRES				
Recordkeeping:			3/15 - This is not my area. I never have liked recordkeeping.	I need to spend more time on recordkeeping -- especially posting.
1. Receives and posts customer payments.	X	X	3/29 - Mrs Allen, Libby Tucker, has really helped me I may learn to like libby. some recordkeeping	Recordkeeping is a very important part of the job. Any students working here needs both ? in- class preparation.
2. Writes receipts for cash payments or when requested by customers.	X	X		
3. Keeps customers accounts up to date and accurate.	X	X		
4. Prepares bank deposits.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
5. Reconciles bank statements.	X	X	4/25 - She really learned a great deal. She'll start handling Petty Cash soon.	I need to review Petty Cash procedures.
6. Tabulates and/or posts data in record books.	X			
7. Administers petty cash fund.	X	X		
8. Prepares stock inventory.	X		5/1 - Mr. McClure is great. He really spent time with me and encouraged me. You and Mrs. Allen were also very helpful.	
ADDITIONS AS TRAINING REQUIRES				
Supplies Distribution:			2/4 - Mr. Jemison seems to resent me. Acts as if I'm going to take his job.	I want Mr Jemison to like me. Any suggestions?
1. Receives, unpacks, and sorts incoming supplies.	X			
2. Counts, measures, weighs, and verifies supplies.	X		2/9 - As usual, you and Mr McClure have smoothed things out. Mr. Jemison has been very helpful	
3. Stores supplies.	X			
4. Orders supplies to replenish.	X			
5. Distributes supplies.	X		3/13 - Everything is going fine.	
ADDITIONS AS TRAINING REQUIRES				
Office Machines Operation:			11/5 - The training plan isn't being followed. All I do is run adding machine & the typewriter.	Can I go ask Mr. McClure to let me use the calculating machine?
1. Operates the following machines:				
a. adding and calculating machines	X	X		
b. electric typewriter	X	X		

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EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
~~c. electric paper shredder~~ (discontinued from this)			12/3 - Mr. McClard complimented me on my speed on adder machine. He said he'd rotate me to other jobs when things settled down in the office	
d. electric stapler	X			
e. electric letter opener	X			
f. addressograph machine	X			
g. postage meter	X			
h. bookkeeping machine	X	X		
2. Uses intercom and multi-line telephone.	X			
ADDITIONS AS TRAINING REQUIRES				
3 Operate addressograph machine (1/5)	X			
ADDITIONS AS TRAINING REQUIRES:				

INDIVIDUALIZED TRAINING PLAN

Copy: Training Sponsor

Name Janet Lynne Hardin Job Title General Office Clerk

Firm United States Stores--Walnut Hill Branch Training Sponsor Mr. Clarence McClurd

Student's Career Objective General Office Clerk in large retail firm

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Receives brief overview of company--organization, role in community, services, types of customers served.	X		9/15 - Gave Janet copies of all organization manuals and standard operating procedures to review.	
2. Receives basic salary information--computation of pay, taxes, deductions.	X		9-20 Needs guidance on appearance and makeup. Teen styles are just out of place in our office	Suggest that you review proper office attire.
3. Receives explanation of policies regarding breaks, holidays, vacations, promotions.	X			
4. Receives information regarding job efficiency--following directions, asking questions, following company practices, doing work on time, maintaining high standards, checking facts and figures.	X	X	9/27 - Janet has been late 3 times. She says she because of her schedule on Mon, Wed, Fri.	Suggest that MWF schedule be adjusted.
5. Receives information regarding importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
6. Receives information about company image--dress, grooming voice, posture, quality of work.	X	X		
7. Receives explanation of work flow within office and importance of student's job to total office output.	X			
8. Meets supervisory personnel and office staff.	X			
ADDITIONS AS TRAINING REQUIRES				
Receptionist:				
1. Greets visitors.	X	X	10/30 - Afraid to meet people very timid.	Suggest study of ×/= charm Course manuals which we make available to all our full-time office workers.
2. Refers callers to appropriate person or makes appointments for them.	X		1/3 - Added responsibility of keeping appointment book with approval of coordinator.	
3. Handles inquiries or requests whenever appropriate.	X		12/18 - Has improved greatly.	
ADDITIONS AS TRAINING REQUIRES				
Typewriting:				
1. Types form letters, memoranda, envelopes, cards, and labels.	X	X	10/1 - Looks like she have poor typing habits — posture, chair, desk, etc.	Suggest more practice on typing numbers.

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
2. Types letters and reports from rough drafts and corrected copies.	X	X	11/20 - Does not erase properly. Depends too much on correction tape.	Give her lots of practice using standard typing masters.
3. Types business forms--orders, bills, checks, telegrams, lists, statements, inventory cards.	X	X	2/28 - Doing very well in this area.	
4. Types stencils, masters, and offset mats.	X	X	4/15 - Has developed into an outstanding typist.	
5. Cleans and maintains typewriter--includes changing of carbon and fabric ribbons.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Filing:				
1. Receives explanation of structure and use of filing systems in the office.	X		11/1 - Just horrible! Misfiles everything!	Suggest that coordinator study our system and then teach Janet how to apply basic knowledge to our office. Concentrate on numeric filing. Suggest that you work with Janet on sections 2 and 4 of our filing manual.
2. Reads, codes, and sorts material to be filed.	X	X		
3. Files: a. incoming correspondence, orders, invoices, price lists, and other material b. copies of outgoing correspondence	X	X	11/30 - Some improvement, but still weak in this area. Needs constant supervision.	

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
4. Maintains follow-up records.	X	X	2/17 - Improving	
5. Traces missing file data.	X	X	3/20 - No problems — she's really worked hard to learn our system.	
6. Replaces worn folders, labels, and index cards.	X			
7. Prepares new file folders when instructed to do so.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Handling Mail:				
1. Handles incoming mail: a. time stamps, sorts, distributes b. replies to routine mail	X	X	10/5 - Doesn't know when to send something 1st, 2nd, 3rd, or 4th class.	Teach her how to choose correct class of mail.
2. Prepares outgoing mail: a. collects outgoing mail b. addresses envelopes and packages by typing, handwriting, or using addressograph machine c. stuff envelopes by hand or with machine d. wraps packages e. computes and affixes postage manually or with postage meter. f. keeps record of postage used	X	X	1/5 - Nobody in office can wrap package. 2/17 - Doing a good job.	If you can teach Janet how to wrap packages, you'll be doing me a real favor.
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Telephone:			11/1 - Does well - has good telephone manners.	
1. Places local and long distance calls.	X	X		
2. Records and delivers telephone messages.	X	X	2/5 - Doing well — no problems.	
3. Routes calls to persons within the organization.	X			
4. Secures information via telephone.	X			
5. Takes orders for merchandise or services.	X			
6. Answers telephone inquiries.	X			
ADDITIONS AS TRAINING REQUIRES				
Recordkeeping:			3/15 - I can sense that Janet does not like bookkeeping. I'm thinking about taking her off this entirely.	Work full of errors. Stress accuracy and give work on posting procedures.
1. Receives and posts customer payments.	X	X		
2. Writes receipts for cash payments or when requested by customers.	X	X	4/1 - This girl really sticks with it. I don't believe this is her best area, but she works hard and is improving.	Review petty cash procedures in school. I plan to let her work with our Petty Cash Fund in the near future.
3. Keeps customers accounts up to date and accurate.	X	X		
4. Prepares bank deposits.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
5. Reconciles bank statements.	X	X	4/28 — Doing much better. Will start her on Petty Cash next week.	
6. Tabulates and/or posts data in record books.	X			
7. Administers petty cash fund.	X	X		
8. Prepares stock inventory.	X			
ADDITIONS AS TRAINING REQUIRES				
Supplies Distribution:			2/5 - Inventory procedures have been examined by Mr Jamison. Will start next week.	Work on FIFO inventory procedure in class.
1. Receives, unpacks, and sorts incoming supplies.	X			
2. Counts, measures, weighs, and verifies supplies.	X		3/16 - Joint is progressing very well. No problems.	
3. Stores supplies.	X			
4. Orders supplies to replenish.	X			
5. Distributes supplies.	X			
ADDITIONS AS TRAINING REQUIRES				
Office Machines Operation:			10/30 - Doing very well. Especially on adding machine. Will let her post ledger cards on bkkp. machine soon.	Practice posting procedures using bkkp. machine.
1. Operates the following machines:				
a. adding and calculating machines	X	X		
b. electric typewriter	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
c. electric paper shredder	X		12/5 - Very fast, but some errors on adding machine	Stress accuracy, then speed, in all related work.
d. electric stapler	X			
e. electric letter opener	X			
f. addressograph machine	X		1/5 - Exceptional with machines.	Compliment coordinator on fine job school is doing on office machines instruction.
g. postage meter	X			
h. bookkeeping machine	X	X		
2. Uses intercom and multi-line telephone.	X			
ADDITIONS AS TRAINING REQUIRES				
ADDITIONS AS TRAINING REQUIRES:				
Duplicating: 2/16			3/15 - Outstanding in this area. Needs almost no instruction.	
1. Operates fluid and ink duplicators	x	x		
2. Stores, files, or disposes of masters and stencils.	x	x		

INDIVIDUALIZED TRAINING PLAN

Copy: Coordinator

Name Janet Lynne Hardin Job Title General Office Clerk

Firm United States Stores--Walnut Hill Branch Training Sponsor Mr. Clarence McClurd

Student's Career Objective General Office Clerk in large retail firm

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:			9/15 - Seemed to understand most of our setup. Not sure if she understands overall company organization	Mr. McClurd will let Janet visit Drug Company manual to check for study and discussion.
1. Receives brief overview of company--organization, role in community, services, types of customers served.	X			
2. Receives basic salary information--computation of pay, taxes, deductions.	X			
3. Receives explanation of policies regarding breaks, holidays, vacations, promotions.	X			
4. Receives information regarding job efficiency--following directions, asking questions, following company practices, doing work on time, maintaining high standards, checking facts and figures.	X	X		
5. Receives information regarding importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
6. Receives information about company image--dress, grooming voice, posture, quality of work.	X	X		
7. Receives explanation of work flow within office and importance of student's job to total office output.	X			
8. Meets supervisory personnel and office staff.	X			
ADDITIONS AS TRAINING REQUIRES				
Receptionist:			11/3 Very shy. Does not remember names. Doesn't know areas of responsibility of supervisors	Study organization charts again. Prepare organization chart of office. Complete Receptionist Units 12 - 14.
1. Greets visitors.	X	X		
2. Refers callers to appropriate person or makes appointments for them.	X		12/7 More confidence when meeting people. Has made real effort to learn duties of all supervisors	
3. Handles inquiries or requests whenever appropriate.	X			
ADDITIONS AS TRAINING REQUIRES				
4. Keep M. McCrudd's appointment book. (1/5)	X	X	1/12 Failed to record two appointments	Complete appointment Records in-basket exercise.
Typewriting:				
1. Types form letters, memoranda, envelopes, cards, and labels.	X	X	9/15 Started by typing envelopes for large mailing. Worked hard, but some errors.	Destress accuracy. Give proofreading drills. Demonstrate chain feeding of envelopes.

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
2. Types letters and reports from rough drafts and corrected copies.	X	X	1/3 Errors reduced. Needs to increase speed when typing memos and letters from handwritten copy.	Cannot estimate margins for good placement. Much Janet judgment placing
3. Types business forms--orders, bills, checks, telegrams, lists, statements, inventory cards.	X	X	10/21 Does not check accuracy of figures before typing invoices	Unit 23 - Business Math Review.
4. Types stencils, masters, and offset mats.	X	X	11/3 much better. Sets up and types tables beautifully.	
5. Cleans and maintains typewriter--includes changing of carbon and fabric ribbons.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Filing:				
1. Receives explanation of structure and use of filing systems in the office.	X		2/7 Really lost! Can't seem to get hang of system	Available Study Units - not applicable. Observe in filing dept. and develop specific problems for Janet
2. Reads, codes, and sorts material to be filed.	X	X	2/17 Janet seems to be slowly getting hang of filing set up.	
3. Files: a. incoming correspondence, orders, invoices, price lists, and other material b. copies of outgoing correspondence	X	X	3/21	

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
4. Maintains follow-up records.	X	X	3/21 - Much better. System difficult to learn. Needs to increase speed when retrieving materials from files	Continue working on basic filing rules. Ask Jan it to bring on-job problems to class for individual assistance. Complete filing Exercise 14-26
5. Traces missing file data.	X	X		
6. Replaces worn folders, labels, and index cards.	X			
7. Prepares new file folders when instructed to do so.	X	X		
ADDITIONS AS TRAINING REQUIRES				
8. Transfers obsolete file materials to inactive storage (5/6)	X			
Handling Mail:				
1. Handles incoming mail: a. time stamps, sorts, distributes b. replies to routine mail	X	X	10/6 Does it always choose correct class of mail when sending letters and packages?	Review postal manuals. Complete Study Unit 7 (Postal Service)
2. Prepares outgoing mail: a. collects outgoing mail b. addresses envelopes and packages by typing, handwriting, or using addressograph machine c. stuff envelopes by hand or with machine d. wraps packages e. computes and affixes postage manually or with postage meter. f. keeps record of postage used	X	X	11/4 -- Doing nicely.	
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Telephone:			11/- Very little telephone work required. Does well when required to use phone	Telephone Study Unit not critical for job Schedule for in-class completion at any convenient time
1. Places local and long distance calls.	X	X		
2. Records and delivers telephone messages.	X	X		
3. Routes calls to persons within the organization.	X		2/7 No problems	
4. Secures information via telephone.	X			
5. Takes orders for merchandise or services.	X			
6. Answers telephone inquiries.	X			
ADDITIONS AS TRAINING REQUIRES				
Recordkeeping:			3/21 Bookkeeping work not accurate	Work with BKKP teacher on posting simulations. Recycle thru Recordkeeping Unit.
1. Receives and posts customer payments.	X	X		
2. Writes receipts for cash payments or when requested by customers.	X	X		
3. Keeps customers accounts up to date and accurate.	X	X	4/3 Improved, But Mr. McClud afraid to let Janet receive and post payments unless under close supervision.	Work thru BKKP. practice sets. BKKp. teacher has agreed to give Janet individual help.
4. Prepares bank deposits.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
5. Reconciles bank statements.	X	X	4/30 Appears that problems are being worked out. Janet will start working with petty cash fund next week.	Get Petty Cash simulations from DE coordinator. Ask Janet to complete them.
6. Tabulates and/or posts data in record books.	X			
7. Administers petty cash fund.	X	X		
8. Prepares stock inventory.	X			
ADDITIONS AS TRAINING REQUIRES				
Supplies Distribution:			12/7 Will start in a month or two. Needed in other areas at present time.	
1. Receives, unpacks, and sorts incoming supplies.	X			
2. Counts, measures, weighs, and verifies supplies.	X		2/7 Mr. Jenison has reviewed procedures. Will start next week.	Review inventory procedures by completing Recordkeeping Study Units 4-12.
3. Stores supplies.	X			
4. Orders supplies to replenish.	X			
5. Distributes supplies.	X		3/21 Does good work; no problems.	
ADDITIONS AS TRAINING REQUIRES				
Office Machines Operation:			11/3 No problems. Will begin posting ledger cards on bkkp. machine next week.	Review posting procedures on bkkp. machine. Complete Practice Exercise 1-3.
1. Operates the following machines:				
a. adding and calculating machines	X	X		
b. electric typewriter	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
~~e. electric paper shredder~~ (taken out of office)	X			
d. electric stapler	X		12/7 Exceptional speed on adding machine. Needs to check work more thoroughly.	Review Job list of the importance of accuracy when dealing with numbers. Complete adding machine units 5 and 6.
e. electric letter opener	X			
f. addressograph machine	X			
g. postage meter	X			
h. bookkeeping machine	X	X		
2. Uses intercom and multi-line telephone.	X			
ADDITIONS AS TRAINING REQUIRES				
3. Operates addressograph machine (1/5)	X			
ADDITIONS AS TRAINING REQUIRES:				
Duplicating (2/16)				
1. Operates fluid and ink duplicaters.	X	X	3/21 Outstanding work. One of the best in office in this area.	
2. Stores, files, or disposes of masters and stencils.				

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APPENDIX B

Model Training Guides for Fifteen Job Titles

BANK CLERK (Teller) 14.0105

Job Description: Receives and pays out money, and keeps records of money and negotiable instruments involved in various bank transactions, performing any combination of the following tasks: Receives checks and cash for deposit, verifies amounts, and examines checks for endorsements. Enters deposits in depositors' passbook or issues receipts. Cashes checks and pays out money upon verification of signatures and customer balances. Places holds on accounts for uncollected funds. Orders supply of cash to meet daily needs, counts incoming cash, and prepares cash for shipment. May compute service charges, file checks, and accept utility bill payments. May photograph records, using microfilming device. May operate various office machines. May sell domestic exchange, travelers checks, and savings bonds. May open new accounts, and compute interest and discounts.

EXPERIENCES AND TRAINING NEEDED

Job Orientation

1. Receives a brief overview of the bank--its organization, role in the business community, services rendered, types of customers or clients served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard bank practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships-importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives information about correct bank image--dress, grooming, voice, posture, quality of work.
7. Receives explanation of work flow within the bank and the importance of the student's job to total bank output.
8. Meets supervisory personnel and bank staff.

Handling Cash

1. Uses a standard procedure for counting and handling cash.
2. Orders, ships, and accounts for currency and coin received from, or shipped to, Federal Reserve or correspondent bank.
3. Protects cash, making certain unusually large cash deposits are placed in vault immediately.
4. Receives money in exchange for what is paid out in transactions involving exchange of coin for currency, or vice versa.
5. Takes out of circulation and redeems badly worn, bent, or damaged coins and currency.
6. Verifies wrapped coins and currency.
7. Identifies counterfeit bills and coins.

Opening and Closing Checking Accounts

1. Opens checking accounts, following procedures used by bank.
2. Closes checking accounts, following procedures used by bank.
3. Refers the closing of a deceased person's account to an officer of the bank.

Operating Teller Station

1. Secures cash to open each day.
2. Handles debits, credits properly.
3. Uses available machines--including computer terminal--during operation.
4. Balances take-in cash with paid-out to prove work.
5. Prepares required proof sheets and other reports at end of day.
6. Prepares cash for daily pick-up.

Paying and Receiving

1. Issues and receives currency and checks using proper paying/receiving procedures.
2. Handles stop payments and overdrafts.
3. Handles postal money orders.
4. Handles checks:
    a. certified
    b. corporation
    c. foreign
    d. traveler's
    e. checks on other banks
    f. checks returned unpaid
    g. checks to order of own bank
    h. stale
    i. checks signed by persons who have died
    j. checks drawn on fiduciary accounts
5. Receives explanation of commonly used methods of "kiting."
6. Determines that powers of attorney are in bank's files before cashing checks signed by people who claim to have such powers.
7. Handles deposits:
    a. deposits to checking and savings accounts
    b. deposits accepted after banking hours
    c. coupons presented for deposit
    d. checks offered by a customer in which only a part is to be deposited

Savings Accounts

1. Opens and cl[illegible]s accounts, following procedures used by bank.
    a. joint
    b. individu[illegible]s
    c. minor ownership of account
    d. Christmas savings
    e. school and club savings
2. Computes interest on deposits and explains to customers.
3. Corrects errors in accordance with bank's policy.
4. "Flags" ledger and signature card immediately upon receiving notification of a lost passbook.
5. Handles savings account withdrawals.

Safe Deposit Operations

1. Grants customers access to boxes.
2. Maintains rent payment card files.
3. Refers to an officer, for decision, all matters arising with respect to safe deposit box in the event of death, insanity, or bankruptcy of the box renter.
4. Informs customers concerning keys to boxes.
5. Rents boxes, following bank's internal procedures.

BOOKKEEPER (Accounting Clerk) 14.0102

Job Description: Keeps records of financial transactions of establishment. Verifies and enters details of transactions as they occur or in chronological order in account and cash journals from items such as sales slips, invoices, check stubs, inventory records, and requisitions. Summarizes details on separate ledgers, using adding machine, and transfers data to general ledger. Balances books and compiles reports to show statistics, such as cash receipts and expenditures, accounts payable and receivable, profit and loss, and other items pertinent to operation of business. Calculates employee wages from plant records to timecards and makes up checks or withdraws cash from bank for payment of wages. May prepare withholding, Social Security, and other tax reports. May compute, type, and mail monthly statements to customers. May complete books to or through trail balance. May operate calculating and bookkeeping machines.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.
8. Meets supervisory personnel and office staff.

Journalizing:

1. Verifies source documents.
2. Analyzes transactions.
3. Journalizes transactions in:
    a. general journal
    b. purchases journal
    c. sales journal
    d. cash receipts journal
    e. cash payments journal
4. Makes adjusting and closing entries.

Posting:

1. Posts transactions to ledger accounts in:
    a. general ledger
    b. accounts receivable ledger
    c. accounts payable ledger

2. Prepares trail balance.
3. Posts adjusting and closing entries to ledger accounts.
4. Closes and balances ledgers.

Financial Reports:
1. Prepares income statement.
2. Prepares balance sheet.
3. Types or duplicates statements for distribution.

Payroll:
1. Computes time cards.
2. Prepares payroll register.
3. Types payroll checks.
4. Prepares voucher check.
5. Enters payroll expense, employee taxes payable, and employee deductions payable in general journal.
6. Computes employer F.I.C.A. tax, federal unemployment tax, state unemployment tax, and enters in general journal.
7. Posts payroll entries to ledger accounts.
8. Posts payroll register to employees' earnings records.
9. Reconciles payroll records at end of each pay period.

Bank Reconciliation:
1. Prepares outstanding checks list.
2. Prepares deposits in-transit list.
3. Prepares reconciliation between bank balance and check book balance.
4. Files canceled checks, outstanding checks list, and reconciliation of bank statement.

Petty Cash Fund:
1. Prepares petty cash vouchers and disburses cash.
2. Journalizes vouchers in petty cash disbursements record.
3. Foots and balances record at end of accounting period.
4. Prepares petty cash statements.
5. Writes checks to replenish petty cash fund.
6. Files vouchers and summary reports.

Office Machines Operation:
1. Uses adding machines and calculators to determine totals, discounts, taxes, receipts, disbursements, etc.
2. Operates bookkeeping machine.
3. Operates check writer.

Filing:
1. Receives explanation of structure and use of filing systems in office.
2. Files incoming correspondence.
3. Files copies of outgoing correspondence.
4. Files source documents and supporting papers, invoices, bills, receipts, lists, orders, checks, statistical data, etc.
5. Retrieves materials and information from files.

Office Communications:
1. Handles customer inquiries about statements and bills.
2. Takes and records telephone messages.
3. Types routine correspondence, interoffice memorandums, financial reports, and statistical reports.
4. Maintains typewriter by cleaning and changing ribbon.

Job Description: Receives funds from customers and employees, disburses funds, and records monetary transactions incidental to conduct of business. Counts money to verify amounts and issues receipts for funds received. Compares totals on cash register with amount of currency in register to verify balances. Endorses checks and lists and totals cash and checks for bank deposit. Prepares bank deposit slips. Posts data to accounts and balances receipts and disbursements. Compiles collection, disbursement, and bank-reconciliation reports. Operates office machines, such as typewriter, calculating and bookkeeping machines.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships-importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.
8. Meets supervisory personnel and office staff.

Cashier Duties

1. Obtains cash box and verifies daily balance sheet.
2. Verifies amounts and issues receipts for customer payments.
3. Figures customer discounts when applicable.
4. Records customer payments in Cash Receipts Journal.
5. Posts payments made by mail and prepares receipts.
6. Stamps or endorses checks for bank deposit.
7. Counts day's receipts for bank deposit.
8. Prepares bank deposit slips.
9. Records bank deposit in Cash Receipts Journal and Cash Payments Journal.
10. Reconciles monthly bank statement with company checking account records.

Cash Register Duties

1. Operates cash register.
   a. makes change
   b. uses identification keys
   c. develops reasonable speed and operating efficiency

2. Counts currency.
    a. wraps coins if required
    b. clips or bands currency if required
3. Compares totals on cash register with amount of currency in register to verify balances.
4. Prepares cash slips or deposit tickets.
5. Makes bank deposits or places monies in company safe.
6. Prepares daily cash report.

Petty Cash Fund

1. Prepares petty cash vouchers.
2. Pays petty cash bills.
3. Posts vouchers to petty cash book.
4. Prepares petty cash statements.
5. Replenishes petty cash fund.
6. Files vouchers and summary reports.

Office Machine Operation

1. Uses adding machines and calculators to determine totals, discounts, taxes, receipts, disbursements, etc.
2. Operates bookkeeping machine.
3. Operates check writer.
4. Operates ticket-dispensing machine.

Filing

1. Receives explanation of structure and use of filing systems in office.
2. Files incoming correspondence.
3. Files copies of outgoing correspondence.
4. Files source documents and supporting papers, invoices, bills, receipts, lists, orders, checks, statistical data, etc.

Office Communications

1. Handles customer inquiries about statements and bills.
2. Takes and records telephone messages.
3. Types routine correspondence, interoffice memorandums, financial reports, and statistical reports.
4. Maintains typewriter by cleaning and changing ribbon.

Job Description: Performs general clerical work requiring the use of the typewriter in the majority of duties. Types letters, reports, bills, applications, contracts late payment notices, and other materials to be filed. Files and secures materials from numeric and alphabetic files. Posts amounts to customer accounts. Sorts and distributes the mail. Answers the telephone. Uses adding and calculating machines, reproducing machines, and transcribing machines. Receptionist duties include receiving clients or customers, ascertaining their wants and directing them accordingly; making appointments; answering inquiries over the telephone; and making future appointments.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.
8. Meets supervisory personnel and office staff.

Typewriting:

1. Operates both electric and manual typewriters.
2. Cleans and maintains typewriter--includes changing of carbon and fabric ribbons.
3. Uses eraser, correction tape, and correction fluid to produce neat corrections.
4. Edits material before typing--grammar, spelling, punctuation, meaning, paragraphing.
5. Chooses proper paper, carbon paper, and other supplies for all jobs.
6. Types accurate letters, reports, forms, statistical material and memorandums from rough draft, corrected copy, direct dictation, and transcribing machines.
7. Types envelopes, cards, and labels.
8. Types stencils, masters, or plates from rough drafts or corrected copy.
9. Composes and types answers to routine letters.
10. Proofreads, corrects, and evaluates quality of all work before returning it to supervisor.

Duplicating:

1. Operates fluid and ink duplicators.
2. Operates photocopy machines.
3. Stores, files, or disposes of masters and stencils.
4. Collates duplicated materials.

Filing:

1. Receives explanation of structure and use of filing systems in the office.
2. Files incoming correspondence.
3. Files copies of outgoing correspondence.
4. Files invoices, bills, receipts, lists, orders, statistical data, minutes. reports, requisitions.
5. Retrieves materials and information from files.

Receptionist:

1. Greets visitors.
2. Refers callers to appropriate person or makes appointments for them.
3. Handles inquiries or requests whenever appropriate.
4. Keeps appointment records.

Telephone:

1. Places local and long distance calls.
2. Records and delivers telephone massages.
3. Routes calls to persons within the organization.
4. Secures information via telephone.
5. Takes orders for merchandise or services.
6. Answers telephone inquiries.
7. Handles complaints via telephone.

Handling Mail:

1. Handles incoming mail:
    a. time stamps, sorts, and distributes
    b. replies to routine mail as directed
2. Prepares outgoing mail:
    a. collects outgoing mail
    b. addresses envelopes and packages by typing, handwriting, or using addressograph machine
    c. stuffs envelopes by hand or with machine
    d. wraps packages
    e. computes and affixes postage manually or with postage meter
    f. keeps record of postage used
    g. batches mail to be sent to post office.

Recordkeeping:

1. Receives and posts customer payments.
2. Writes receipts for cash payments.
3. Keeps customer accounts up to date and accurate.
4. Tabulates and/or posts data in record books.
5. Orders, receives, stores, and maintains inventories of supplies.

Office Machine Operation:

1. Operates the following machines:
    a. electric and manual typewriters
    b. duplicating and photocopy machines
    c. addressograph machine

d. postage machine
e. adding and calculating machines
f. transcribing machines

2. Uses intercoms and multi-line telephone.

DUPLICATING MACHINE OPERATOR 14.0301

Job Description: Reproduces handwritten, typewritten, or printed masters, stencils, and offset mats by setting up and operating spirit, ink, and offset duplicating machines. May also operate photocopy, thermographic, and xerox machines. In large businesses may operate letter press. May type and prepare masters, stencils, and offset mats. Makes adjustments and small repairs to machines. Collates and prepares materials for shipment.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives explanation of work flow within the office and the importance of the student's job to total office output.
7. Receives information about correct company image--dress, grooming, voice, posture, quality of work.
8. Meets supervisory personnel and office staff.

Spirit Duplication:

1. Operates the duplicating machine.
2. Cleans and maintains duplicator--includes changing wick, removing loading tray, adding fluid, and making minor adjustments.
3. Determines what kinds and weights paper to use for various jobs.
4. Determines when to use the spirit duplicator rather than another process.
5. Removes smudges and marks from masters when necessary.
6. Adds or eliminates parts of master by inserting or removing material on master.
7. Duplicates copies from two or more colors in same page of copy.
8. Duplicates copies up to four sides on each copy.

Ink Duplication:

1. Operates ink duplicating machine.
2. Cleans and maintains ink duplicator--includes refilling ink, changing ink, and making minor machine adjustments.
3. Determines what kinds and weights paper to use for various jobs.
4. Removes smudges and marks from stencils when necessary.
5. Uses stencil cement for mending when necessary.
6. Uses correction fluid whenever necessary during duplicating runs.
7. Uses the mimeoscope and styluses.

Offset Duplication:

1. Operates the offset duplicator.
2. Cleans and maintains the offset duplicator--making simple adjustments.
3. Uses different sizes of offset masters (or mats) and different grades--depending upon the number of copies desired.
4. Uses the writing media for offset masters--reproducing pencils, reproducing ink, nonreproducing pencils, and carbon ribbons for the typewriter.
5. Adds or eliminates parts of offset master when necessary.
6. Duplicates copies of various sizes.

Photocopy Machine:

1. Operates the photocopy machine.
2. Cleans and makes minor adjustments to machine.

Thermographic Copying:

1. Operates the thermographic machine.
2. Determines when to use the copying machine.
3. Duplicates the originals in carbonbased ink or pencil, because the images made by some inks cannot be reproduced.

Xerographic Copying:

1. Operates the copying machines (Xerox and Apeco Electro-Stat are both in this group).
2. Prepares offset masters on paper or metal plates and prepare masters for the spirit duplicator.
3. Reproduces photographs, drawings, sketches, and forms.
4. Cleans and makes minor adjustments to machine.

The Letterpress:

1. Operates the letterpress machine.
2. Sets up the letterpress and prints all jobs requires.
3. Uses the letterpress only when common duplicating devices cannot meet copy-making needs.

Collating:

1. Arranges duplicated materials in proper sequence.
2. Arranges duplicated materials into proper groups.
3. Performs finishing operations:
    a. collates
    b. folds
    c. perforates
    d. staples
    e. cuts
    f. stitches

Telephone:

1. Takes and records telephone messages.
2. Secures information via the telephone.
3. Places telephone calls.
4. Keeps a record of telephone calls.

Inventory:

1. Keeps supplies inventory records.
2. Orders supplies.
3. Receives and stores supplies.

Job Description: Files correspondence, cards, invoices, receipts, and other records in alphabetical or numerical order, or according to subject matter, phonetic spelling, or other system. Places material in file cabinet, drawers, boxes, or in special filing cases. Locates and removes material from files when requested Keeps records of material removed, stamps material received, traces missing file folders, and types indexing information on folders. May enter data on records. Classifies material when classification is not readily discernible. Disposes of obsolete files in accordance with established retirement schedule or legal requirements. May operate keypunch to enter data on tabulating cards. May type reports. May use calculating machine.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.
8. Meets supervisory personnel and office staff.

Records Management:

1. Receives instruction on specific filing system used in office--card system, vertical files, visible system, power system.
2. Receives instruction on special files such as punched card system, computer tape file, microfilms, microfiche, microform if they are used.
3. Examines the files with the supervisor and receives explanation of stamping, coding, and release marks.
4. Inspects and codes letters in incoming mail and has them checked by the supervisor.
5. Files incoming and outgoing correspondence and documents under supervision.
6. Examines the card files to observe typing placement and information recorded.
7. Types sample file cards and has them checked by the supervisor.
8. Types cards for the card file.
9. Receives instruction in cross referencing.
10. Cross references cards and copies of incoming correspondence and has the work approved.

11. Types file folder labels.
12. Receives explanation of the order in which work should be completed.

Information Retrieval:

1. Retrieves material from files when it is requested.
2. Receives instruction in the use of copying equipment and circumstances under which copies are made.
3. Copies correspondence, documents, and other material as needed.
4. Supplies written information from file data.
5. Operates automatic information retrieval system, if available.

Charge and Follow-Up Procedures:

1. Charges out material using:
    a. guides
    b. out folders
    c. substitution cards
2. Keeps tickler or follow-up file.
3. Retrieves material from borrower when it has been out beyond period allowed.

File Searches:

1. Receives instruction on where and how to locate missing records.
2. Conducts searches for missing records.
3. Records what data can be recalled if materials are known to be lost and places sheets in file in lieu of missing materials to prevent further searches.

Records Retention and Disposal:

1. Receives instruction on transfer, storage, and disposal of records.
2. Uses records retention schedules.
3. Transfers material to storage or inactive files.
4. Records inactive papers by microfilming.

Records Protection:

1. Identifies vital records and stores them in appropriate locations.
2. Makes facsimile or microfilm copies of vital records to be stored in another location.

Additional Dutues:

1. Maintains various files as requested.
    a. hold
    b. pending
    c. open
    d. closed
    e. expiration
2. Orders filing supplies.
3. Revises and up-dates files.
4. Replaces worn file folders, guides, and labels.
5. Distributes requested materials to departments.
6. Enters data on records.

Job Description: Performs any combination of following and similar clerical tasks not requiring knowledge of systems or procedures: writes or types bills, statements, receipts, checks or other documents, copying information from one record to another; proofreads records or forms; counts, weighs, or measures materials; sorts and files records, receives money from customers and deposits money in bank; addresses envelopes or packages by hand or with typewriter or addressograph machine; stuffs envelopes by hand or with machine; answers phone, conveys messages and runs errands; stamps, sorts, and distributes mail; stamps or numbers forms by hand or machine; operates office duplicating equipment.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.
8. Meets supervisory personnel and office staff.

Receptionist:

1. Greets visitors.
2. Refers callers to appropriate person or makes appointments for them.
3. Handles inquiries or requests whenever appropriate.
4. Keeps appointment records.

Typewriting:

1. Types form letters, memoranda, envelopes, cards, and labels.
2. Types letters and reports from rough drafts and corrected copies.
3. Types business forms--orders, bills, checks, telegrams, lists, statements, inventory cards.
4. Types stencils, masters, and offset mats.
5. Cleans and maintains typewriter--includes changing of carbon and fabric ribbons.

Duplicating:

1. Operates duplicating and/or photocopy equipment.
2. Stores, files, or disposes of masters, stencils, and offset mats as directed.

Filing:

1. Receives explanation of structure and use of filing systems in the office.
2. Reads, codes, and sorts material to be filed.
3. Files:
    a. incoming correspondence, orders, invoices, price lists, and other material
    b. copies of outgoing correspondence
4. Prepares new file folders when instructed to do so.
5. Maintains records of materials removed from files.
6. Traces missing file data.
7. Destroys obsolete file materials or transfers them to inactive storage when instructed to do so.
8. Replaces worn folders, labels, and index cards.

Handling Mail:

1. Handles incoming mail.
    a. time stamps, sorts, and distributes
    b. replies to routine mail as directed
2. Prepares outgoing mail:
    a. collects outgoing mail
    b. addresses envelopes and packages by typing, handwriting, or using addressograph machine
    c. stuffs envelopes by hand or with machine
    d. wraps packages
    e. computes and affixes postage manually or with postage meter
    f. keeps record of postage used
    g. batches mail to be sent to post office

Telephone:

1. Place local and long distance calls.
2. Records and delivers telephone messages.
3. Routes calls to persons within the organization.
4. Secures information via telephone.
5. Takes orders for merchandise or services.
6. Answers telephone inquiries.
7. Handles complaints via telephone.
8. Relieves switchboard operator.

Recordkeeping:

1. Receives and posts customer payments.
2. Writes receipts for cash payments or when requested by customers.
3. Keeps customers accounts up to date and accurate.
4. Prepares monthly reports for accounting department.
5. Prepares bank deposits.
6. Reconciles bank statements.
7. Tabulates and/or posts data in record books.
8. Prepares the payroll.
9. Administers petty cash fund.
10. Prepares stock inventory.

Supplies Distribution:

1. Receives, unpacks, and sorts incoming supplies.
2. Counts, measures, weighs, and verifies supplies.
3. Stores supplies.
4. Orders supplies to replenish.
5. Distributes supplies.

Office Machines Operation:

1. Operates the following machines:
    a. adding and calculating machines
    b. duplicating and photocopy machines
    c. electric typewriter
    d. electric paper shredder
    e. electric stapler
    f. electric letter opener
    g. addressograph machine
    h. envelope stuffing machine
    i. postage machine
    j. bookkeeping machine
2. Uses intercom and multi-line telephone

KEY-PUNCH OPERATOR 14.220201

Job Description: Operates key-punch machine to transcribe numeric and/or alphabetic data from source material onto punchcards. Plans and prepares program cards to control duplicating, spacing, alphabetic or numeric punching, and skipping while performing a job of repetitive data. May tend machines in tabulating department.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyality
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.
7. Receives explanation of work flow within the office and the student's job to total office output.
8. Meets supervisory personnel and office staff.

Data Preparation:

1. Receives and checks source material for completeness.
2. Detects invalid characters, spelling, and phrases on source material.
3. Prepares card layout and designs card fields to accommodate numbers and words of varying length.

Program Card Preparation:

1. Prepares
   a. standard program cards
   b. alternate program cards
   c. alternate with left-zero program cards
2. Removes drum, places program card on drum, re-inserts drum.

Key-Punch Operations:

1. Uses functional switches--main-line, print, clear, program selection, auto/skip, card feed.
2. Records coded or uncoded data--using numeric, alpha, backspace, release, and duplicate keys--with speed and accuracy.
3. Works from source materials which may or may not be arranged for card punching.

Verifier Operations

1. Operates verifier with speed and accuracy.
2. Uses program cards for each job performed.
3. Identifies error and non-error cards before they reach the card stacker within established speed and accuracy limits.
4. Produces correct versions of incorrectly punched cards.
5. Picks out error cards from decks of verified cards.
6. Discards incorrectly punched cards.
7. Identifies error cards from decks by comparing source documents with tabulated print-outs within established speed and accuracy limits.

Office Communications/Related Duties:

1. Routes completed cards to next work station.
2. Files and removes cards from master files.

Machine Maintenance:

1. Changes fuses, empties chip box, and changes ribbons.
2. Requisitions needed supplies.
3. Keeps work area and equipment clean.
4. Detects faulty feeding, positioning, ejecting, duplicating, skipping, punching, or other mechanical malfunctions and notifies supervisor.
5. Uses prying knife to remove jammed cards.

Job Description: Takes dictation and prepares legal papers and correspondence of legal nature, such as summons, complaints, motions, and subpoenas. Handles the incoming and the outgoing mail. Greets visitors, ascertains nature of business, and conducts visitors to appropriate person. Answers the telephone and gives information to callers or routes calls to the appropriate person. Places outgoing telephone calls. Schedules appointments for employer. Files legal papers, correspondence, and other records.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives explanation of Legal Code of Ethics--confidential nature of all communications, oral and written, should be emphasized.
2. Receives explanation of the importance of:
   a. accuracy--comma out of place may be fatal
   b. time--actions must be commenced, concluded, or executed within rigid time limits
3. Receives explanation of office policy concerning proper grooming and office etiquette.
4. Receives explanation of structure of the law office.
5. Receives explanation of flow and procedure of work and how student-learner's job contributes to total office output.
6. Meets all members of the office staff.

Typewriting and Shorthand:

1. Types the following from attorneys' direct dictation, shorthand notes, transcribing machine, handwritten rough drafts, corrected copies, and/or data compiled by student-learners.
   a. legal instruments
      1. acknowledgments
      2. articles of incorporation
      3. affidavits
      4. agreements
      5. bankruptcy petitions
      6. briefs
      7. by-laws of a corporation
      8. contracts
      9. deeds
      10. divorce papers
      11. leases
      12. power of attorney
      13. wills and probate
   b. court papers
      1. complaints
      2. demurrers
      3. instructions to jury
      4. summons and suppoenas
      5. notices of trial
      6. stipulations
      7. interrogatives and answers

2. Types manuscripts for printing in legal style.
3. Corrects galley and page proofs.
4. Types routine correspondence from rough drafts, dictation or dictation equipment.
5. Cleans and maintains typewriter--includes changing of carbon and fabric ribbons.

Recordkeeping:

1. Keeps financial records:
    a. attorney's checkbook
    b. cashbook
    c. general ledger
    d. record of recording fees
    e. record of attorney's time with clients
2. Handles office payroll.
3. Records receipts of cash and checks and posts to clients' accounts.
4. Maintains inventory of supplies; reorders as necessary.
5. Maintains files of sample legal documents and various pleadings.
6. Administers petty cash fund.
7. Maintains an up-to-date record of what is happening and what has happened within the courts, particularly in those cases in which firm has been involved.

Research:

1. Receives instruction on how to use:
    a. clerk's index system
    b. docket
    c. register
    d. clerk's minute book
    e. court calendar
2. Receives instruction on how to use law library.
3. Receives instruction on how to use:
    a. National Reporter System
    b. blue books
    c. white books
    d. American Digest
    e. Shepard's Citations
    f. form books
    g. reference books
4. Gathers information about cases.
5. Assists in obtaining and organizing facts for documents.

Filing:

1. Receives explanation of structure and use of files.
2. Maintains files:
    a. client
    b. general
    c. personal
    d. tickler
    e. follow-up
    f. daily court dockets
    g. reports of bar associations
    h. newspaper articles concerning cases in which attorney is involved or might be interested in

3. Establishes new case files.
4. Files tax supplements in tax books.
5. Uses cross-referencing and retention plans.
6. Uses charge-out methods on materials removed from files.

Receptionist:

1. Greets clients and visitors.
2. Obtains information on new clients; completes required forms.
3. Schedules appointments.
4. Keeps appointment book up to date.
5. Checks court dockets daily to determine whether changes may have benn made since the day before.

Telephone:

1. Places local and long distance calls.
2. Keeps current the directory of telephone numbers of
    a. attorneys associated in current cases
    b. attorneys to recommend for work your office does not handle
    c. attorneys on opposite side of current cases
3. Records and delivers telephone messages.
4. Routes calls to attorneys within the firm.
5. Secures information via telephone.
6. Answers telephone inquiries.

Mail Handling:

1. Handles incoming mail:
    a. time stamps, sorts, and distributes
    b. replies to routine mail as directed
2. Prepares outgoing mail:
    a. collects outgoing mail
    b. addresses envelopes and packages by typing, handwriting, or using addressograph machine
    c. stuffs envelopes by hand or with machine
    d. wraps packages.
    e. computes and affixes postage manually or with postage meter
    f. keeps record of postage used
    g. batches mail to be sent to post office

Housekeeping:

1. Maintains orderly desk, files, and work area.
2. Keeps reception area neat and attractively arranged.
3. Provides current reading material.

Job Description: Sorts incoming mail for distribution and dispatches outgoing mail. Opens envelopes by hand or with letter-opening machine. Stamps date and time of receipt on incoming mail. Sorts mail according to destination and type, such as returned letters, adjustments, bills, orders, and payments. Readdresses undeliverable mail bearing insufficient or incorrect address. Examines outgoing mail for appearance and seals envelopes by hand or with envelope-sealing machine. Stamps outgoing mail by hand or with postage meter. May fold letters or circulars and insert into envelopes. May distribute and collect mail. May weigh mail to determine that postage is sufficient. May keep record of registered mail. May address mail, using addressing machine. May be designated according to type of mail handled as Direct-Mail Clerk, Registered-Mail Clerk, etc.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.
8. Meets supervisory personnel and office staff.

Incoming Mail:

1. Marks the date and time on all letters with pen, pencil, rubber stamp, or time stamp machine.
2. Opens incoming mail immediately upon receipt either by hand or by machine.
3. Sorts the mail according to addressee or department.
4. Removes and carefully examines letters and other enclosures, attaching these to the letter.
5. Distributes the mail to departments and addressees.
6. Checks letters for signature and address before discarding envelope.
7. Notes omission of any enclosure in margin of the letter.
8. Keeps log of missing enclosures, checks, stamps, cash, etc.
9. Does not open personal or confidential mail. If it happens accidently, puts letter back, reseals and writes on envelope Sorry Opened by Mistake. Adds initials.

10. Sees that special delivery and registered letters do not go out with regular mail but are dispersed immediately upon receipt in mail room.
11. Keeps a register of expected mail and one of registered, insured, and special delivery received.
12. Routes multi-distribution mail by attaching slips with necessary names and department.
13. Photocopies material to be sent to two or more persons or departments when necessary.

Outgoing Mail:

1. Collects mail from outgoing boxes at regular intervals.
2. Sorts mail into various classes, keeping interoffice mail separate.
3. Weighs the outgoing mail and determines postage.
4. Determines what is to be sent by parcel post and the size the weight limitations of parcel post packages.
5. Determines parcel post zones.
6. Uses special services of post office, such as Certified Mail, Special Delivery, Registry, and Return Receipt when necessary.
7. Operates postage meter--involving imprinting of postage seals and adhesive paper tape.
8. Seals envelopes of bulk mail.
9. Attaches stamps to bulk mail if no postage machine is available.
10. Folds business letters and inserts into envelopes.
11. Sorts mail according to class, city, and state.
12. Places mail in mail box or takes parcel post to post office.
13. Purchases stamps or necessary postage for postage meter.
14. Sorts and bags in regular interoffice envelopes any branch mail.
15. Uses Postal Service Manual or Mailers Guide to Postal Service if questions arise.

Office Communications:

1. Takes and records telephone messages.
2. Answers inquiries via telephone concerning specific enclosures or pieces of missing mail.
3. Types routine correspondence and interoffice memorandums.

Filing:

1. Receives explanation of structure and use of filing systems used.
2. Files incoming correspondence.
3. Files copies of outgoing correspondence.
4. Retrieves materials and information from files.

Job Description: Performs basic secretarial duties requiring the use of the typewriter for the majority of work assignments. Prepares medical charts and reports for doctors and hospital personnel, utilizing knowledge of medical terminology. Types medical history reports, insurance forms, bills, memorandums, correspondence and other materials to be filed and/or duplicated. Opens and routes incoming mail and attaches appropriate file for patient. Files and secures materials from files. Receives and places telephone calls. Computes totals by using adding machines or calculators. Transcribes dictation utilizing shorthand, stenotype, or other transcribing methods. Greets patients or guests, ascertaining their wants and directs them accordingly; schedules appointments; answers inquiries over the telephone.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives explanation of hospital, clinic, or office rules and regulations, personnel and other policies.
2. Receives information about layout of hospital, clinic, or office and structure of department to which assigned.
3. Receives explanation of the importance of absolute accuracy in dealing with patients' records.
4. Receives explanation of Code of Ethics in medical profession:
    a. diagnosis (present and past)
    b. examinations
5. Receives information about hospital's, clinc's, or office's system of:
    a. filing
    b. billing
    c. bookkeeping
6. Meets department staff.

Typewriting and Shorthand:

1. Types the following from doctors' direct dictation, shorthand notes, transcribing machine, handwritten rough drafts, corrected copies and/or data compiled by student-learner:
    a. medical record and ledger
    b. preadmission registration
    c. request for payment
    d. surgeon's report
    e. standard medical report
    f. admissions record
    g. group hospital insurance form
    h. individual hospital insurance form (including Medicare and Medicaid forms)
    i. inpatient hospital admission and billing
    j. outpatient hospital billing
    k. patient index card
    l. patient transfer form
    m. patient histories
    n. patient physicals
    o. nursing home admission record
    p. analysis of hospital service
    q. admission and discharge registers

2. Composes and types collection letters and letters about appointments and referrals, insurance, fees, supplies, and equipment.
3. Types envelopes, cards, and labels.
4. Types doctors' personal correspondence.
5. Cleans and maintains typewriter--includes changing of carbon and fabric ribbons.

Recordkeeping:

1. Keeps financial records:
    a. doctor's checkbook
    b. daily record of collections
    c. patient's accounts
    d. cashbook
    e. general ledger
2. Administers petty cash fund.
3. Receives and credits payments from patients.
4. Prepares and sends statements to patients.
5. Maintains supplies inventory; reorders when necessary.

Filing:

1. Receives explanation of structure and use of files.
2. Maintains files:
    a. patient
    b. general
    c. personal
    d. tickler
    e. follow-up
3. Retrieves charts from files on patients with appointments or as registration is accepted.
4. Records information in patient files.
    a. diagnosis
    b. x-ray reports
    c. lab reports
    d. operative reports
    e. medication/prescriptions
    f. history
5. Transfers patient files to other doctors.

Receptionist Duties:

1. Greets patients and visitors.
2. Obtains information on new patients; completes required forms.
3. Schedules appointments.
4. Keeps appointment book up to date.

Telephone Duties:

1. Answers telephone.
2. Routes calls for immediate medical aid to nurse or doctor.
3. Uses telephone to:
    a. obtain results of tests on patients
    b. schedule tests for patients
    c. arrange hospital admittance for patients
    d. schedule out-patient examinations
    e. dispatch medical information to hospital or insurance companies
    f. remind patients of appointments

Mail Handling:

1. Opens and distributes incoming mail.
2. Prepares outgoing correspondence for mailing.

Clinical Duties:

1. Prepares patients for examination:
    a. weighing
    b. pulse
    c. temperature
2. Obtains urine specimens.
3. Aids doctors whenever requested to do so.
4. Prepares injections.

Housekeeping Duties:

1. Cleans and sets up examination rooms.
2. Straightens waiting room.
3. Straightens doctor's desk.
4. Keeps examination rooms supplied with gowns, sheets, and other necessary items.

Job Description: Receives clients or customers coming into establishment, ascertains their wants, and directs them accordingly. Obtains caller's name and arranges for him to see person called upon. Directs caller to his destination and records name, time of call, nature of business, and person called upon. May make future appointments and answer inquiries. May perform variety of clerical duties and other duties pertinent to the type of establishment. May collect and distribute mail and messages. May receive patients in office of physician, dentist, or other health service and be designated as receptionist.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.
8. Meets supervisory personnel and office staff.

Receiving Callers:

1. Greets callers.
2. Assists callers in the reception area.
3. Announces callers.
4. Maintains visitors' log
5. Arranges appointments.
6. Receives and records payments for services.
7. Issues visitors' passes or identification cards.
8. Refers callers to appropriate person.
9. Escorts caller to office of person being visited.
10. Makes introduction.
11. Receives instruction on handling emergencies and unexpected callers.
12. Receives instruction on handling angry or unruly callers.

Scheduling Appointments:

1. Receives explanation of method of scheduling and recording appointments.
2. Receives explanation of method of registering office callers.
3. Receives explanation of procedures followed in cancellation and rescheduling of appointments.

Job Description: Schedules appointments, gives information to callers, takes dictation, and otherwise relieves officials of clerical work and minor administrative and business detail. Reads and routes incoming mail. Locates and attaches appropriate file to correspondence to be answered by employer. Takes dictation in shorthand or on Stenotype machine and transcribes notes on typewriter, or transcribes from voice recordings. Composes and types routine correspondence. Files and gives information to callers or routes call to appropriate official and places outgoing calls. Schedules appointments for employer. Greets visitors, ascertains nature of business, and conducts visitors to employer or appropriate person. May not take dictation. May arrange travel schedule and reservations. May compile and type statistical reports. May supervise clerical workers. May keep personnel records. May record minutes of staff meeting.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.
8. Meets supervisory personnel and office staff.

Typewriting and Shorthand:

1. Types the following from direct dictation, shorthand notes, transcribing machine, handwritten rough drafts, corrected copies, and/or data compiled by student-learner:
   a. envelopes, cards, and labels
   b. spirit, stencil, and offset mats
   c. statistical reports
   d. minutes of meetings
   e. memoranda
   f. letters
   g. reports
   h. iteneraries
   i. business forms
   j. telegrams

4. Maintains a calendar of appointments.

Telephone and Switchboard Techniques:

1. Answers the telephone.
2. Screens telephone calls.
3. Gives directions to persons over the telephone. Answers inquiries over the telephone.
4. Places telephone calls--local and long distance, using direct dialing when possible.
5. Revises and updates telephone directory.
6. Keeps telephone records such as frequently called numbers.
8. Records and delivers telephone messages.
9. Uses various types of equipment such as PBX, call director, button phone, data phone.
10. Pages people on intercom.
11. Sends and receives telegrams.

Mail and Mail Procedures:

1. Opens and sorts mail.
2. Stamps date and time on incoming mail.
3. Records certified mail.
4. Reroutes mail.
5. Stores mail until regular delivery time.
6. Folds letters for outgoing mail
7. Stuffs and seals envelopes.
8. Sorts outgoing mail by class and destination.
9. Weighs and stamps mail.
10. Uses postage meter.

Filing:

1. Maintains files of:
   a. visitors' business cards
   b. frequently called telephone numbers
2. Files material alphabetically in personal files.

Typing:

1. Cleans and maintains typewriter.
2. Changes ribbons when necessary
3. Types mailable letters, memoranda, tabulations, and reports from rough draft and corrected copy.
4. Types neat, clean carbons for letters.
5. Types labels, cards, envelopes, and information on various types of business forms.

Recordkeeping:

1. Receives and posts customer payments.
2. Administers petty cash fund.

Housekeeping:

1. Keeps reception area neat and attractively arranged.
2. Provides current reading material.

2. Composes and types replies to routine correspondence.
3. Types copy where all lines end at right margin (justifying).
4. Types display or decorative type copy.
5. Edits letters dictated by employer.
6. Takes dictation over the telephone.
7. Cleans and maintains typewriter--includes changing of carbon and fabric ribbons.

Recordkeeping:

1. Receives and posts customer payments.
2. Writes recepts for cash payments or when requested by customers.
3. Keeps customers accounts up to date and accurate.
4. Prepares monthly reports for accounting department.
5. Prepares bank deposits.
6. Reconciles bank statements.
7. Tabulates and/or posts data in record books.
8. Prepares the payroll.
9. Administers petty cash fund.
10. Prepares stock inventory.

Filing:

1. Receives explanation of structure and use of filing systems in the office.
2. Reads, codes, and sorts material to be filed.
3. Files:
    a. incoming correspondence, orders, invoices, price lists, and other materials
    b. copies of outgoing correspondence
4. Prepares new file folders when instructed to do so.
5. Maintains records of materials removed from files.
6. Traces missing file data.
7. Destroys obsolete file materials or transfers them to inactive storage when instructed to do so.
8. Replaces worn folders, labels, and index cards.

Receptionist:

1. Greets visitors.
2. Refers callers to appropriate person or makes appointments for them.
3. Handles inquiries or requests whenever appropriate.
4. Keeps appointment records.

Telephone:

1. Places local and long distance calls.
2. Records and delivers telephone messages.
3. Routes calls to persons within the organization.
4. Secures information via telephone.
5. Takes orders for merchandise or services.
6. Answers telephone inquiries.
7. Handles complaints via telephone.
8. Relieves switchboard operator.

Handling Mail:

1. Handles incoming mail:
    a. time stamps, sorts, and distributes
    b. replies to routine mail as directed

2. Prepares outgoing mail:
    a. collects outgoing mail
    b. addresses envelopes and packages by typing, handwriting, or using addressograph machine
    c. stuffs envelopes by hand or with machine
    d. wraps packages
    e. computes and affixes postage manually or with postage meter
    f. keeps record of postage used
    g. batches mail to be sent to post office

Organizing and Planning:
1. Arranges itineraries.
2. Arranges for training aids, facilities, and equipment.
3. Makes preparations for meetings.
4. Plans own work.
5. Prepares agenda for meetings.
6. Obtains information needed for correspondence from var ous departments.

Housekeeping:
1. Maintains orderly desk, files, and work area.
2. Keeps reception area neat and attractively arranged.
3. Provides current reading material.

Job Description: Takes dictation in shorthand from one or more persons and, in most cases, is under close supervision of immediate supervisor. Dictation material includes correspondence, reports, and other information which is transcribed on the typewriter. Mail handling and records management are the supportive activities most frequently associated with taking dictation. May transcribe recorded material. May perform a variety of related clerical duties: answering the telephone, greeting visitors, making appointments, cutting stencils, operating duplicating as well as transcribing and other equipment. Familarity with a specialized vocabulary is sometimes required.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives explanation of company policies.
2. Receives explanation of the importance of loyalty, dependability, initiative, cooperation, dress and grooming, office etiquette, good speech, and the maintenance of a high production level.
3. Receives explanation of the proper office attitude toward the job, toward responsibilities, and toward others.
4. Receives explanation of the company manual and of the company policies (vacation policies, hours of work, coffee break policies, etc.).
5. Receives explanation of structure of department to which assigned.
6. Receives explanation of flow and procedure of work and how student-learner's job contributes to total office output.
7. Meets supervisory personnel and office staff.

Dictation:

1. Takes dictation in shorthand of correspondence, reports, and other matter.
2. Keeps dictation tools accessible at all times (notebook, pens, pencils, reference manual, and dictionary).
3. Uses pauses in the dictation to reread notes, insert necessary punctuation marks, correct poor outlines, make longhand notes when necessary, or insert symbols to signify words which must be checked for meaning or spelling.
4. Makes changes in notes, such as deletions or additions, in the correct manner.

Typewriting and Transcription:

1. Transcribes all dictated material after editing the shorthand notes (using dictionary and reference manuals when needed.
2. Makes carbon copies of transcripts.
3. Makes corrections of transcript and carbon while typing.
4. Proofreads transcript.
5. Types envelope for transcript and attaches enclosures.
6. Takes transcript to employer for signature.
7. Types envelopes for carbon copies and takes carbon copies to employer for initialing.
8. Cleans and maintains the typewriter--includes changing carbon and fabric ribbons.

Machine Transcription:

1. Transcribes letters, reports, or other recorded data, using transcribing machine and typewriter.

2. Maintains a file of belts or tapes.
3. Maintains transcribing machine and belts or tapes in working order.
4. Proofreads letters carefully before removing them from the typewriter.
5. Types envelope for transcript and attaches enclosures.
6. Makes carbon copies of transcripts.
7. Takes transcript to employer for signature.
8. Prepares envelopes for carbon copies and takes copies to employer for initialing.

Filing:

1. Receives explanation of filing system employed in business.
2. Files incoming correspondence and copies of outgoing correspondence.
3. Opens new file folders when instructed or when deemed necessary.
4. Retrieves material and information from files.
5. Traces information temporarily missing from files.
6. Maintains follow-up system.
7. Checks order and condition of files periodically; straightens, repairs, replaces as necessary.
8. Destroys obsolete materials or transfers to inactive and/or storage files when instructed to do so.

Mail:

1. Determines the class of outgoing mail.
2. Determines postage required and affixes it to mail.
3. Uses a postal scale and rate tables.
4. Receives and sorts incoming mail; routes mail.
5. Opens employer's mail and attends to it if requested.
6. Maintains mail log.
7. Uses Zip Code Directory, Cross Reference, etc.

Receptionist Duties:

1. Greets visitors.
2. Refers callers to appropriate person or makes appointments for them.
3. Handles inquiries or requests whenever appropriate.
4. Keeps appointment records.

Telephone:

1. Takes and records telephone messages.
2. Secures information via telephone.
3. Places long distance calls.
4. Keeps record of telephone calls.

Duplicating:

1. Types spirit master for duplicating and operates spirit duplicator.
2. Types stencil for duplication and operates mimeograph machine.
3. Operates photocopying machine.

Office Supplies:

1. Organizes and maintains supply room.
2. Maintains supply inventory.
3. Reorders supplies.

Job Description: Transcribes dictation (letters, reports, and other data) from transcription (voice reproducing) machine and typewriter. Operates transcription machine by putting record, belt, or tape on the machine and setting needle or other threading device at the beginning of the dictation. The operator then turns dials to regulate the volume, tone, and speed of voice reproduction and types the message heard through the earphone. Other duties may include typing from written copy, supplying unrecorded information such as name, address, and date, and transferring information from one form to another. May have to file, answer the telephone, be the receptionist (receive and route callers) or stamp and distribute the mail depending on the size and organization of a given office.

EXPERIENCES AND TRAINING NEEDED

Job Orientation:

1. Receives a brief overview of the company--its organization, role in the business community, products made or services rendered, types of clients or customers served.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.
4. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, producing work on time, maintaining high standards, checking facts and figures.
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.
8. Meets supervisory personnel and office staff.

Transcribing Machine Operation:

1. Receives instruction on the operation of the transcribing machine that will be used.
2. Listens to and transcribes belt , discs, or records from files in order to become accustomed to machine.
3. Reviews office style manual or handbook for:
   a. letter styles
   b. letter placement
   c. special notations
   d. punctuation styles
4. Receives instruction on how to set work priorities according to:
   a. rush orders
   b. revisions
   c. routine--first come, first served
5. Transcribes from following classifications:
   a. orginal dictation from belt--letters, memorandums, telegrams, narrative reports, preliminary reports

b. recorded material--form letters, stored paragraphs, letter format, proposal format
c. special request--statistical reports, meeting agendas, flowcharts, report updates

6. Edits all work before handing to supervisor.
7. Revises work as requested.
8. Makes carbon copy of all routine work.
9. Obtains needed information from files--account numbers, names and addresses, ZIP codes.
10. Cleans and maintains transcribing machine.

Other Typewriting Duties:

1. Types letters and reports from rough drafts and corrected copies.
2. Types business forms--orders, bills, checks, telegrams, lists, statements. inventory cards.
3. Types stencils, masters, and offset mats.
4. Cleans and maintains typewriter--includes changing of carbon and fabric ribbons.

Filing:

1. Receives explanation of structure and use of filing systems in the office.
2. Files magnetic belts, discs, or records.
3. Files carbon copies of letters and other types of information requiring a carbon copy.
4. Secures information as needed for transcription from files.

Receptionist:

1. Greets and receives office callers while employer is away if nobody else is in office.
2. Answers telephone.
3. Secures information by telephone necessary for transcription.
4. Keeps appointment records.

Telephone:

1. Takes and records telephone messages.
2. Secures information via telephone.
3. Places long distance calls.
4. Keeps record of telephone calls.

APPENDIX C

A Sample Training Agreement

SAMPLE TRAINING AGREEMENT[1]

Student's Name_____Birth Date_____Age_____

Student's Address _____Telephone_____

School _____Telephone_____

Training Station_____Telephone_____

Address of Training Station_____

Training Supervisor_____Position_____

Dates of Training Period: From_____To_____

Average Number of Hours of Employment: Per Day _____Per Week_____

Student-Learner's Rate of Beginning Pay_____

Career Objective_____

Basic skills, attitudes, and knowledges needed in this occupation:

Major areas of experience and training to be provided at training station:

Major areas of related instruction to be provided in class:

RESPONSIBILITIES

The STUDENT-LEARNER considers his job experience as contributing to his career objectives and agrees:

1. To be regular in attendance, both in school and on the job.

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[1]This training agreement is an adaptation of one found in Teaching Guide for Cooperative Office Education (Richmond: Business Education Service, State Department of Education), 1970, pp. 24-25.

2. To perform his training station responsibilities and classroom responsibilities in an efficient manner.

3. To show honesty, punctuality, courtesy, a cooperative attitude, proper health and grooming habits, appropriate dress, and a willingness to learn.

4. To conform to the rules and regulations of the training station.

5. To furnish the teacher-coordinator with necessary information about his training plan and to complete promptly all necessary reports.

6. To consult the teacher-coordinator about any difficulties arising at the training station or related to his training plan.

7. To participate in those co-curricular school activities that are required in connection with the COE program.

The PARENTS of the student-learner, realizing the importance of the training program in the student-learner's attaining his career objectives, agrees:

1. To encourage the student-learner to carry out effectively his duties and responsibilities.

2. To share the responsibility for the conduct of the student-learner while training in the program.

3. To accept responsibility for the safety and conduct of the student-learner while he is traveling to and from the school, the training station, and his home.

The TRAINING STATION, recognizing that close supervision of the student-learner will be needed, agrees:

1. To cooperate in the development of a training plan and to follow the plan until it is mutually agreed to change it.

2. To provide a variety of work experiences for the student-learner that will contribute to the attainment of his career objective.

3. To endeavor to employ the student-learner for at least the minimum listed number of hours each day and each week for the entire training period.

4. To adhere to all Federal and State regulations regarding employment, child labor laws, minimum wages, and other applicable regulations.

5. To assist in the evaluation of the student-learner.

6. To provide time for consultation with the teacher--coordinator concerning the student--learner and to discuss with the teacher-coordinator any difficulties the student-learner may be having.

7. To provide available instructional material and occupational guidance for the student-learner.

The TEACHER-COORDINATOR, representing the school, will coordinate the training program toward a satisfactory preparation of the student-learner for his occupational career objective and agrees:

1. To assume responsibility for the initiation and development of a training plan and to insure that it is followed until it is mutually agreed to change it.

2. To see that the necessary related classroom instruction is provided.

3. To make periodic visits to the training station to observe the student-learner, to consult with the training sponsor, and to render any needed assistance with training problems of the student-learner.

4. To assist in the evaluation of the student-learner.

ADDITIONAL COMMENTS:

By _____ _____
Employer Parent

_____ _____
Training Sponsor Student-Learner

_____ DATE _____
Teacher-Coordinator

APPENDIX D

Individualized Training Plans

Developed by

Virginia Cooperative Office Education Coordinators

INDIVIDUALIZED TRAINING PLAN

Copy: _____

Name Debbie Knight Job Title Accounting Clerk

Firm Concrete Structures, Inc. Training Sponsor Mr. Jim Dranchak

Student's Career Objective Accounting Clerk

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Receives explanation of company policies.	X			
2. Receives explanation of importance of loyalty, dependability, cooperation, grooming and high production level.	X	X		
3. Receives explanation of structure of the department.	X			
4. Receives explanation of duties to be performed.	X			
5. Meets fellow workers.	X			
ADDITIONS AS TRAINING REQUIRES				
Accounting:				
1. Purchases certain material.	X			
2. Writes purchase orders.	X	X		

Developed by Phyllis D. Boothe, Varina High School, Richmond, VA

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
3. Approves purchase orders.	X			
4. Distributes copies of purchase orders.	X			
5. Records green copies of purchase orders on control sheets.	X			
6. Sends bills for approval.	X	X		
7. Makes purchases reports.	X	X		
8. Sends purchases reports to managers.	X			
9. Prepares accounts payable vouchers.	X	X		
10. Prepares manual check vouchers.	X	X		
11. Issues purchase order numbers.	X			
ADDITIONS AS TRAINING REQUIRES				
Recordkeeping:				
1. Records vendor names for accounts payable.	X			
2. Keeps record of each purchase order written.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
3. Keeps record of each vendor name and number. ADDITIONS AS TRAINING REQUIRES	X			
Routine Clerical: 1. Proofreads forms. 2. Prepares coffee. 3. Runs errands. 4. Folds letters and stuffs envelopes. ADDITIONS AS TRAINING REQUIRES	X X X X	X X		
Typewriting: 1. Types checks, offset masters, letters, envelopes, cards for rotary files, and other business forms. ADDITIONS AS TRAINING REQUIRES	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Telephone:				
1. Answers telephone and takes messages for President.	X	X		
2. Answers telephone and takes messages for sales office.	X	X		
4. Answers general questions from telephone callers.	X			
ADDITIONS AS TRAINING REQUIRES				
Filing:				
1. Files material in central files.	X	X		
2. Files check register copy of checks.	X	X		
3. Files file copy of checks.	X	X		
4. Files dead purchase orders.	X			
5. Files live purchase orders.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
6. Files invoices, paid bills and other forms.	X	X		
7. Retrieves information from files.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Office Machines:				
1. Operates 10-key adding machine.	X	X		
2. Operates electronic calculator.	X	X		
3. Sends messages on TWX machine.	X			
4. Punches time sheets and paid bills on keypunch machine.	X			
5. Runs microfilm machine.	X			
ADDITIONS AS TRAINING REQUIRES				
Duplicating Processes:				
1. Receives materials to be duplicated.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
2. Consults with person requesting service.	X			
3. Obtains supplies needed.	X			
4. Duplicates material on multilith machine.	X	X		
5. Staples material when needed.	X	X		
6. Delivers material.	X			
7. Stores material for later use.	X			
8. Makes copies on copy machine.	X			
9. Cleans multilith machine.	X	X		
10. Puts toner and paper in copy machine.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Mail Operations:				
1. Stamps mail received.	X			
2. Distributes mail.	X			
3. Runs outgoing mail through postage meter.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
4. Sends registered mail and return receipt requested mail.	X			
5. Checks for postage due.	X			
6. Sorts mail by:				
1. Local	X			
2. Air mail	X			
3. Out of town	X			
4. Out of state	X			
7. Determines rates by weighing mail.	X	X		
8. Keeps record of ascending and descending register.	X			
9. Takes out personal mail without stamps.	X			
10. Takes mail to post office.	X			
ADDITIONS AS TRAINING REQUIRES				
Receptionist Duties:				
1. Mans switchboard on Monday and Friday.	X			
2. Makes long-distance and local calls.	X	X		

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EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
3. Takes telephone messages.	X			
4. Answers questions from callers.	X	X		
5. Reroutes phone calls.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Inventory:				
1. Checks supplies in cabinet and replenishes when necessary.	X			
2. Checks supplies for duplicating machines and replenishes when necessary.	X			
3. Checks supply of company envelopes and stationery and replenishes when necessary.	X			
ADDITIONS AS TRAINING REQUIRES				

INDIVIDUALIZED TRAINING PLAN

Copy: _____

Name Diane Leininger Job Title Clerk-Typist

Firm City of Fairfax Chamber of Commerce Training Sponsor Barbara Freezon

Student's Career Objective Clerk-Typist--Secretary

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Receives overview of organization's role in business community, services rendered to members and community.	X			
2. Receives salary information.	X			
3. Receives explanation of policies regarding working hours, breaks, holidays, vacations, and promotions.	X			
4. Receives information on the importance of accuracy, proofreading, and production.	X	X		
5. Meets co-workers and supervisor.	X			
6. Receives procedures book.	X			
ADDITIONS AS TRAINING REQUIRES				

Developed by Richard Daiger, Robinson Secondary School, Fairfax, Virginia.

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Receptionist:				
1. Greets visitors.	X	X		
2. Refer callers and make appoint- ments.	X	X		
3. Handles inquiries and requests.	X			
4. Handles requests and makes appointments on the telephone.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Typing:				
1. Uses electric Olympia with carbon ribbon.	X	X		
2. Types letters from handwritten notes.	X	X		
3. Types form letters using the MT/ST.	X	X		
4. Types mimeograph stencils.	X	X		
5. Types memoes and billing statements.	X	X		
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Mimeograph Operator:				
1. Prepares and runs stencils for mailings to membership.	X			
ADDITIONS AS TRAINING REQUIRES				
Addressing Machine Operator:				
1. Prepares new address cards.	X			
2. Runs envelopes for membership mailings.	X			
ADDITIONS AS TRAINING REQUIRES				
Xerox Machine Operator:				
1. Runs copies of materials for members.	X	X		
2. Runs copies of correspondence for filing.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
ADDITIONS AS TRAINING REQUIRES				
File Clerk: 1. Files and locates correspondence. 2. Locates information for members and guests. ADDITIONS AS TRAINING REQUIRES	X	X		
Postage Machine Operator: 1. Handles out-going mail, affixing postage with postage machine. ADDITIONS AS TRAINING REQUIRES				

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EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Other Duties:				
1. Sets up answering service device before closing.	X			
2. Makes and serves tea to visitors.	X	X		
3. Cleans desk, dishes, and empties trash cans (general office cleaning).	X			
4. Runs errands--deliveries to members; getting signatures on letters, checks, etc; obtaining needed office supplies.				
ADDITIONS AS TRAINING REQUIRES				

INDIVIDUALIZED TRAINING PLAN

Copy: _____

Name Laveita Ann Medlin Job Title Clerk-Typist (Insurance Office)

Firm Benschoten & Carter Insurance Agency Training Sponsor Mrs. Mildred Gibson

Student's Career Objective Clerk-Typist in an insurance office

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Receives brief overview of company--organization, role in business community, services rendered, types of customers served.	X			Developed by Lydia Bell, York High School, Yorktown, Virginia.
2. Receives basic salary information; payroll period, computation of pay, taxes withheld, payroll deductions.	X			
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.	X			
4. Receives information regarding job efficiency--following directions, asking questions, following company practices, producing work on time, maintaining high standards, checking facts and figures.	X	X		
5. Receives information for effective personal relationships--importance of punctuality, dependability,	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
cooperativeness, pleasantness sincerity, and loyalty.				
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.	X	X		
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.	X	X		
8. Meets supervisory personnel and office staff.	X			
ADDITIONS AS TRAINING REQUIRES				
Receptionist:				
1. Greets visitors.	X	X		
2. Assists visitors in reception area.	X			
3. Refers visitors to appropriate person and makes introductions when necessary.	x			
4. Completes applications for prospective policyholders.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
5. Places data in diary regarding prospective policyholders and sends follow-up letter to home office if no action has been taken within ten days.	X			
6. Handles inquiries whenever appropriate.	X			
ADDITIONS AS TRAINING REQUIRES				
Telephone:				
1. Answers the telephone and routes calls to persons within the office.	X	X		
2. Places local and long distance calls.	X	X		
3. Takes applications for insurance over the telephone.	X			
4. Records and delivers telephone messages.	X	X		
5. Answers telephone inquiries and gives directions.	X			
6. Revises and updates telephone directory.	X	X		

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EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
ADDITIONS AS TRAINING REQUIRES				
Typewriting:				
1. Operates Royal electric typewriter. (IBM electric--in class)	X	X		
2. Types letters from rough draft and corrected copy.	X	X		
3. Edits material before typing--grammar, spelling, punctuation, meaning, paragraphing.	X	X		
4. Types questionnaires and form letters to be mailed to policyholders.	X			
5. Types applications for prospective policyholders.	X			
6. Types memoranda, envelopes, cards, and labels.	X	X		
7. Types business forms--checks, invoices, billing statements, and inventory cards.	X	X		
8. Composes and types answers to routine letters.	X	X		

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EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
9. Chooses proper paper, carbon paper, and other supplies for all jobs.	X	X		
10. Uses eraser and correction tape to produce neat corrections.	X	X		
11. Proofreads, corrects, and evaluates quality of all work before returning to supervisor.	X	X		
12. Cleans and maintains typewriter --includes charging of carbon and fabric ribbons.	X			
ADDITIONS AS TRAINING REQUIRES				
Filing:				
1. Receives explanation of structure and use of filing systems.	X	X		
2. Reads, codes, and sorts materials to be filed.	X	X		
3. Files incoming correspondence in policyholders' folders.	X			
4. Files copies of outgoing correspondence in folders.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
5. Files copies of invoices, receipts, and billing statements.	X			
6. Retrieves files for insurance agents when action is to be taken on customer's policies.	X			
7. Refiles folders in active, expired, or cancelled file cabinets.	X			
8. Maintains tickler files for billing purposes.	X			
9. Prepares new file folders when directed to do so.	X	X		
10. Maintains records of materials removed from files.	X			
11. Traces missing file data.	X			
12. Replaces worn folders and labels.	X			
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Handling Mail:				
1. Receives instructions for handling incoming mail.		X		
2. Prepares outgoing mail:				
a. Collects outgoing mail	X			
b. Addresses envelopes by typing or using addressograph machine	X	X		
c. Stuffs envelopes by hand	X	X		
d. Computes and affixes postage with postage meter	X			
e. Keeps record of postage used	X			
f. Batches mail to be sent to post office	X			
ADDITIONS AS TRAINING REQUIRES				
Duplicating:				
1. Operates photostat copier.	X			
2. Stores and files materials.	X			
3. Collates duplicated materials.	X			
4. Changes paper and toner in photostat copier.	X			
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Recordkeeping:				
1. Receives payments from customers for premiums that are due and writes receipts.	X			
2. Turns over money and receipts to bookkeeper.	X			
ADDITIONS AS TRAINING REQUIRES				
Office Machine Operation:				
1. Operates the following machines:				
a. Royal and IBM electric	X	X		
b. Photostat copier	X			
c. Addressograph machine	X			
d. Postage meter	X			
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Housekeeping:				
1. Maintains orderly desk, files and work area.	X	X		
2. Keeps reception area neat and attractively arranged.	X			
3. Provides current reading material for reception area.	X			
ADDITIONS AS TRAINING REQUIRES				

INDIVIDUALIZED TRAINING PLAN

Copy: _____

Name Roxie Covington Job Title File Clerk

Firm Pratt Clinic LTD. Training Sponsor Mrs. Lee Dillon

Student's Career Objective Receptionist and General Office Clerk in a doctor's office

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Receives a brief overview of the clinic and the types of medical services it renders to the community.	X			
2. Receives instruction about the basic confidentiality of the materials and information contained in the medical folders	X	X		
3. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).	X	X		
4. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.	X			
5. Receives information regarding job efficiency--following directions, asking questions, following standard company practices, completing work	X	X		

Developed by Rubie Lee Johnson, James Monroe High School, Fredericksburg, Virginia.

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
on time, maintaining high standards, checking facts, figures, and completion of records.				
7. Receives information about correct company image--dress, grooming, voice, posture, quality of work.	X	X		
8. Receives explanation of work flow within the medical records department and the Clinic and the importance of the student's job to the total Clinic's efficiency.	X			
9. Meets supervisory personnel and office staff.	X			
10. Receives instruction in telephone usage, which is mostly inter-clinic.	X	X		
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Records Management:				
1. Receives instruction on specific filing system used in the Clinic--alphabetic card file and color-coded vertical shelf files using the Terminal Digit numerical system.	X			
2. Examines the files with the supervisor and receives explanation of the numbering system.	X			
3. Receives instruction in finding numbers of patients in card file and numbering material for patients' records (charts).	X			
4. Observes experienced file clerk as she numbers papers.	X			
5. Numbers papers which need numbering--hospital papers, X-rays, EKG's, biopsies, tissue reports, Emergency Room sheets.	X			
6. Receives instruction about the order in which papers should be placed in individual patient's folders (charts).	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
7. Arranges papers in folder and has work inspected by the supervisor.	X			
8. Receives instruction on assigning numbers to new patients.	X			
9. Writes information for new patients on sample 3x5 card and has work approved by supervisor.	X			
10. Prepares cards for the card file.	X	X		
11. Receives instruction on cross referencing.	X	X		
12. Cross references cards and has the work approved.	X			
13. Receives a list of the codes which indicate that no chart has been prepared for the patient.	X			
14. Receives explanation of codes recorded on 3x5 alphabetic patient cards.	X			
15. Receives instruction on preparation of new patient's chart.	X			
16. Receives explanation of the order in which work should be completed. (priorities)	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
17. Receives instruction about locations of doctors' offices.	X			
18. Receives instruction about the use of green "Out" sheets or cards.	X			
a. Dr. Matson and Surgery Dept. use green sheets to record appointments of patients.				
b. Other departments use an appointment book; then the page is copied and sent to Medical Records Dept. and the file clerk copies the name of the patient on the green "Out" sheet.				
c. File clerk looks up and pulls charts.				
d. Green "Out" sheet is placed on file shelf in place of the patient's chart.				
e. File clerk removes green "Out" sheet when the chart is returned to the shelf.				
f. File clerk scratches appointment from green				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
sheet and returns sheet to pile on the counter.				
19. Receives instruction in entering patient's file number on bills from doctors. Bills from doctors for patients come to Medical Records where the file clerk enters the patient number whether it is a new or old patient. The file clerk then puts the bills in the dumb waiter or other designated place for the receptionist to pick up.	X			
20. Receives instruction about where to place charts when they are returned to the department.	X			
21. Collects charts from the receptionists' stations at the end of the day.	X			
22. Sorts charts and puts them in numerical order.	X	X		
23. Files charts at the end of the day.	X	X		
24. Pulls out green "Out" cards and scratches names from the cards.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
25. Places cards on counter for future use. ADDITIONS AS TRAINING REQUIRES	X			
Information Retrieval:				
1. Receives instruction in retrieving charts from the shelves and substituting green "Out" sheets.	X			
2. Retrieves charts from files as they are requested and puts "Out" card in place of the chart, with the aid of the supervisor.	X			
3. Prepares charts for patients who have appointments with each doctor. a. Appointment sheets are sent down to the department in advance. File clerk puts numbers on appointment sheets if the numbers are missing. b. Writes appointments on green sheets. c. Sorts green sheets in numerical order.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
d. Pulls charts. e. Sees that everything is in proper order in the folder. f. Stamps date for which the charts have been pulled. g. Stuffs charge tickets in the charts.				
4. Receives instruction about where to put charts for the receptionists to pick them up (window, file cabinet, top of refrigerator, dumb waiter).	X			
5. Distributes the charts as directed by the supervisor.	X			
6. Receives instruction in the use of copying equipment and circumstances under which copies are made.	X	X		
7. Copies correspondence, documents, and other material as needed.	X	X		
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Charge and Follow Up:				
1. Receives instruction in taking green "Out" sheets, appointment sheets, and charge sheets from dumb waiter and numbering them.	X			
2. Numbers several papers with the aid of the supervisor.	X			
3. Charges out patient charts, using green "Out" sheets.	X			
4. Retrieves material from borrower when it has been out beyond period allowed and when it is needed by another doctor.	X	X		
ADDITIONS AS TRAINING REQUIRES				
File Searches:				
1. Receives instruction on where and how to locate missing records.	X	X		
2. Conducts searches for missing records.	X	X		
3. Records what data can be recalled if materials are known	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
to be lost and places sheets in file in lieu of missing materials to prevent further searches. ADDITIONS AS TRAINING REQUIRES				
Records Retention and Disposal: 1. Receives instruction on transfer, storage, and disposal of records. (At present the Clinic never destroys a record. If material should be disposed of, it would be buried or burned.) ADDITIONS AS TRAINING REQUIRES	X	X		
Records Protection: 1. Identifies vital records and stores them in appropriate locations. ADDITIONS AS TRAINING REQUIRES	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Additional Duties:				
1. Maintains various files as requested: a. hold b. pending c. open d. expiration--move records to expired file.	X	X		
2. Orders filing supplies.	X	X		
3. Revises and updates files.	X	X		
4. Replaces worn file folders, guides, and labels.	X	X		
5. Distributes requested materials to departments.	X			
ADDITIONS AS TRAINING REQUIRES				

INDIVIDUALIZED TRAINING PLAN

Copy: _____

Name Linda Mae Carter Job Title General Office Clerk

Firm G. C. Murphy Company #308 Training Sponsor Mrs. Lucille Hawkins Huffman

Student's Career Objective General Office Clerk in large retail firm

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Receives brief overview of store organization, role in community, products sold, types of customers served.	X			Developed by Revere A. Houck, Culpeper County High School, Culpeper, Virginia.
2. Receives basic salary information-payroll period, computation of pay, taxes withheld, payroll deductions.	X	X		
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.	X	X		
4. Receives information regarding job efficiency--following directions, asking questions, following store practices, producing work on time, maintaining high standards, checking facts and figures.	X	X		
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness,	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
pleasantness, sincerity, and loyalty.				
6. Receives information about correct store image--dress, grooming, voice, posture, quality of work.	X	X		
7. Receives explanation of work flow within the office and the importance of the student's job to total office and store output.	X			
8. Meets supervisory personnel and office and store staff.	X			
ADDITIONS AS TRAINING REQUIRES				
Typewriting:				
1. Typewrites letters and memos for the manager and assistant managers.	X	X		
2. Typewrites names and company numbers on time cards and payroll envelopes.	X	X		
3. Cleans and maintains typewriter.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
ADDITIONS AS TRAINING REQUIRES				
Handling Mail:				
1. Handles incoming mail:				
a. time and store stamps, sorts, and distributes	X			
b. replies to routine mail	X	X		
2. Prepares outgoing mail:				
a. collects outgoing mail				
b. addresses envelopes and packages by typewriting or handwriting	X	X		
c. stuffs envelopes by hand	X	X		
d. wraps packages	X	X		
e. computes and affixes postage manually	X	X		
ADDITIONS AS TRAINING REQUIRES				
Office Housekeeping:				
1. Sweeps and dusts the office.	X			
2. Keeps office neat and in order.	X			

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EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
3. Locks the safe and closes the office at the end of the day.	X			
4. Rings the bell for lunch, dinner, and closing time.	X			
ADDITIONS AS TRAINING REQUIRES				
Receptionist:				
1. Greets visitors.	X	X		
2. Refers callers to appropriate persons or makes appointments for them.	X	X		
3. Handles inquiries or requests when appropriate.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Telephone:				
1. Places local and long distance calls.	X	X		
2. Records and delivers telephone messages.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
3. Routes calls to persons within store.	X	X		
4. Takes orders for merchandise.	X			
5. Informs customers when special orders arrive.	X			
6. Secures and gives information by phone.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Filing:				
1. Receives explanation of structure and use of filing systems in the office.	X			
2. Inspects, indexes, codes, sorts, and stores layaways.	X			
3. Files new listings in the stock books.	X			
4. Files incoming correspondence, orders, invoices, price lists, and other material and copies of outgoing records.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
ADDITIONS AS TRAINING REQUIRES				
Recordkeeping:				
1. Records employees' cash and charge purchases and balances accounts weekly.	X			
2. Records customers' layaways and payments on them.	X			
3. Records items that are lost in the store and later claimed.	X			
4. Records price list changes and corrections.	X			
5. Records markups and markdowns on merchandise.	X			
6. Records direct orders and warehouse orders.	X			
7. Records freight bills at the end of each day.	X			
8. Records sales to organizations that get 10% discounts --for example, school groups.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
ADDITIONS AS TRAINING REQUIRES				
Handling Cash:				
1. Takes the change call or changes large bills for the cashier.	X	X		
2. Cashes checks for customers and employees.	X	X		
3. Serves as substitute cashier.	X	X		
4. Balances the standard register.	X			
5. Balances the transfer desk records.	X			
6. Balances the employees' purchases register.	X			
7. Takes lifts--takes money from all cash registers in the store, counts, and records it.	X			
8. Makes bank deposit.	X			
9. Pays the truckers for freight.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
10. Orders store supplies	X			
11. Balances the markup and markdown book each month.	X			
12. Takes care of store payroll and keep personnel records.	X	X		
ADDITIONS AS TRAINING REQUIRES				

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INDIVIDUALIZED TRAINING PLAN

Copy: _____

Name Crystal Chapman Job Title General Office Clerk in a Public High School

Firm York County School Board Training Sponsor Mr. R. Helms, Principal

Student's Career Objective General Office Clerk

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Meets supervisory staff, office personnel, staff members.	X			
2. Receives a brief outline of expected duties.	X			Developed by Sharon Jones, Tabb High School, Tabb, Virginia.
3. Receives salary information; payroll period, number of hours, deductions.	X			
4. Receives information regarding relationships with principal, teachers, staff, students.	X			
5. Receives information concerning loyalty to employer.	X	X		
6. Receives explanation of appropriate attire, quality of work, voice, etc.	X	X		
7. Receives information regarding relationships with parents and visitors.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
ADDITIONS AS TRAINING REQUIRES				
Receptionist:				
1. Greets visitors.	X			
2. Refers callers to appropriate person or assists in any way possible.	X	X		
3. Handles inquiries or requests whenever possible.	X	X		
4. Keeps appointment book--both in her office and employer's office.	X	X		
5. Uses the intercom to relay messages to students or teachers in class.	X			
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Typewriting:				
1. Operates both electric and manual typewriter.	X	X		
2. Types stencils and masters.	X	X		
3. Types purchase orders, checks bills, inventory cards, grade level cards, student attendance sheets, library reports and lunch menus.	X	X		
4. Types tests for teachers.	X	X		
5. Types letters requesting student transcripts.	X			
6. Cleans and maintains typewriter--change ribbon(both fabric and carbon.)	X	X		
ADDITIONS AS TRAINING REQUIRES				
Telephone:				
1. Answers telephone (needs to know how to use multi-line telephone).	X	X		
2. Records and delivers telephone messages.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
3. Answers telephone inquiries and routes complaints to proper person.	X			
ADDITIONS AS TRAINING REQUIRES				
Duplication:				
1. Operates fluid and ink duplicating equipment.		X		
2. Stores, files, or disposes of masters, and stencils.	X	X		
3. Keeps duplicating supplies stocked.	X			
4. Keeps equipment clean and repaired.	X	X		
5. Operates photocopy equipment:				
a. prepares and sends student transcripts	X			
b. keeps machine in operating order and supplies available.	X	X		
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Filing:				
1. Receives explanation of structure and use of filing system in office.	X			
2. Reads, codes, and sorts material to be filed.	X	X		
3. Files:				
a. incoming correspondence, orders, invoices, price lists, etc.	X			
b. student folders	X			
c. student level changes	X			
d. copies of outgoing correspondence	X			
e. folders of active and inactive teachers	X			
f. lunch sheets	X			
4. Prepares new file folders when needed.	X	X		
5. Keeps student attendance files up to date.	X			
6. Destroys obsolete file materials or places them in inactive storage.	X			
7. Replaces worn folders and labels.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
8. Maintains follow-up files of all students when applicable.	X			
9. Retrieves materials and information from files.	X			
ADDITIONS AS TRAINING REQUIRES				
Handling Mail:				
1. Handles incoming mail.	X	X		
2. Replies to routine mail.	X			
3. Prepares and sends transfer students' records to other schools.	X			
4. Prepares outgoing mail:				
a. collects outgoing mail.	X	X		
b. addresses envelopes and package labels	X			
c. stuffs envelopes	X			
d. wraps packages.	X			
e. computes and affixes postage manually or with postage meter	X	X		
f. keeps record of postage used	X	X		
g. batches mail to be sent to post office.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
ADDITIONS AS TRAINING REQUIRES				
Recordkeeping:				
1. Keeps accurate records of petty cash.	X	X		
2. Writes receipts for cash payments from faculty or students.	X			
3. Prepares monthly reports for school board.	X			
4. Prepares bank deposits.	X	X		
5. Reconciles bank statement.	X	X		
6. Tabulates and/or posts data in record books.	X			
7. Keeps textbook inventories.	X			
8. Counts and records monies received from lunch room, school store, etc.	X	X		
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Supplies Distribution:				
1. Replenishes supplies when needed by faculty or administration.	X			
2. Receives, unpacks, and verifies supplies received.	X			
3. Distributes supplies to teachers.	X			
4. Keeps accurate records of all supplies.	X	X		
5. Keeps storeroom in order.	X			
ADDITIONS AS TRAINING REQUIRES				
Office Machines:				
1. Operates the following machines:				
a. 3M Copier	X			
b. public address system	X			
c. electric typewriter	X	X		
d. calculator	X	X		
e. telephone	X	X		
f. electric stapler	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
ADDITIONS AS TRAINING REQUIRES				
Miscellaneous:				
1. Delivers messages to teachers and students.	X			
2. Places attendance cards in teachers mailboxes.	X			
ADDITIONS AS TPAINING REQUIRES				

INDIVIDUALIZED TRAINING PLAN

Copy: _____

Name Rebecca Sue Foreman Job Title General Office Clerk

Firm Smith & Williams Funeral Home Training Sponsor Bonnie R. Smith / Paul Humphries

Student's Career Objective General Office Clerk in Small Business Firm

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Receives brief overview of funeral home--organization, role in business community, services rendered, types of clients served.	X			Developed by Marie Smith, Norview High School, Norfolk, Virginia.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions.	X	X		
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions.	X			
4. Receives information regarding job efficiency--following directions, asking questions, following company practices, producing work on time, maintaining high standards, checking facts and figures.	X	X		
5. Receives information for effective personal relationships--importance of puncutality,	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
dependability, cooperativeness, pleasantness, sincerity, and loyalty.				
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.	X	X		
7. Receives explanation of work flow within the office and the importance of the student's job to the total office output.	X			
8. Meets supervisory personnel and office staff.	X			
ADDITIONS AS TRAINING REQURIES				
Receptionist:				
1. Greets salesmen and general visitors.	X	X		
2. Receives bereaved family and friends of the deceased.	X			
3. Refers callers to appropriate person or makes appointments for them.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
4. Handles inquiries or requests whenever appropriate. ADDITIONS AS TRAINING REQUIRES	X			
Typewriting:				
1. Types form letters for families of the deceased, pallbearers, ministers, musicians, and fraternal organizations.	X	X		
2. Types memoranda, envelopes, labels, cross reference funeral file cards, merchandise description cards.	X	X		
3. Types personal letters to families, clergy, various veteran's and business organizations.	X	X		
4. Types reports--such as monthly funeral list to State Health Department and State Funeral Examining Board--from rough drafts and corrected copies.	X	X		
5. Types business forms--orders,	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
bills, checks, lists, statements, inventory cards, death certificates, insurance benefit forms, social security forms, veteran's benefit forms.				
6. Cleans and maintains typewriter--includes changing of fabric ribbons.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Filing:				
1. Receives explanation of structure and use of filing systems in the office.	X			
2. Reads, codes, and sorts material to be filed.	X	X		
3. Files:				
a. incoming correspondence, orders, invoices, price lists, funeral index cards, funeral folders, and other material.	X	X		
b. copies of outgoing correspondence in general files and individual funeral folders.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
4. Maintains follow-up records of families served, ministers, musicians, pallbearers, fraternal organizations, and merchandise used relative to past funerals.	X	X		
5. Traces missing file data.	X	X		
6. Replaces worn folders, labels and index cards.	X			
7. Prepares new funeral file folders and correspondence folders when instructed to do so.	X	X		
8. Transfers obsolete file materials to inactive storage annually.	X			
ADDITIONS AS TRAINING REQUIRES				
Handling Mail:				
1. Handles incoming mail:				
a. sorts, distributes	X			
b. replies to routine mail	X	X		
2. Prepares outgoing mail:				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
a. collects outgoing mail	X			
b. addresses envelopes and packages by typing, handwriting, or using addressograph machine	X	X		
c. stuffs envelopes by hand	X	X		
d. computes and affixes postage	X	X		
e. wraps packages	X			
f. keeps record of postage used	X	X		
g. Bulk mail: addresses envelopes, sorts according to Zip Code, bundles and ties, places in bags, and appropriately labels mail bags for mass mailings of direct mail advertising.	X			
ADDITIONS AS TRAINING REQUIRES				
Telephone:				
1. Places local calls relative to confirming various aspects of funeral arrangements including contacting ministers, musicians, pallbearers, cemetories, police assistance hospitals, health department, newspaper, airlines, etc.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
2. Places long distance calls relative to confirming various aspects of funeral arrangements such as newspaper notices and out-of-town funeral arrangements with other funeral homes.	X			
3. Records and delivers telephone messages.	X	X		
4. Routes calls to persons within the organization.	X			
5. Secures information via telephone from hospitals, nursing homes, police, out-of-town funeral homes, or next of kin regarding notification of death.	X			
6. Places orders for merchandise and/or services to casket manufacturers, vault companies, printing companies, and funeral and embalming supply firms.	X			
7. Answers telephone inquiries.	X			
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Recordkeeping:				
1. Receives and posts funeral payments.	X	X		
2. Writes receipts for cash payments or when requested by customers.	X	X		
3. Keeps customers accounts up to date and accurate.	X			
4. Prepares bank deposits.		X		
5. Reconciles bank statements.		X		
6. Tabulates and/or posts data in record books.	X	X		
7. Prepares stock inventory of caskets, funeral clothing, urns, funeral and embalming supplies.	X			
8. Maintains accurate file for each funeral served.	X			
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Supplies Distribution:				
1. Receives, unpacks, sorts, and verifies incoming office supplies.	X			
2. Stores office supplies.	X			
3. Orders office supplies to replenish stock.	X			
ADDITIONS AS TRAINING REQUIRES				
Office Machines Operation:				
1. Operates the following machines:				
a. adding and calculating machines	X	X		
b. electric typewriter	X	X		
c. addressograph machine	X			
d. postage meter	X			
e. checkwriter	X	X		
2. Uses intercom and multi-line telephone.	X			
3. Operates fluid, mimeograph, and offset duplicators.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
ADDITIONS AS TRAINING REQUIRES				
Office Housekeeping: 1. Responsible for the maintenance, upkeep, and general appearance of office and personal work area. ADDITIONS AS TRAINING REQUIRES	X	X		

INDIVIDUALIZED TRAINING PLAN

Copy: _____

Name Deborah Lamb Job Title Legal Secretary (Trainee)

Firm James A. Overton, Attorney Training Sponsor Mrs. Payne

Student's Career Objective Legal Secretary

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Becomes acquainted with fellow employees and supervisory personnel.	X			
2. Becomes familiar with personnel policies.	X			
3. Receives explanation of the importance of such ideas as loyalty, confidentially, dependability, cooperation, personal grooming, initiative and overall professional attitude.		X		
4. Receives explanation of exactly where responsibility lies in the overall functioning of the firm and how the student-learner can help the firm function smoothly.	X			
ADDITIONS AS TRAINING REQUIRES				

Developed by Mrs. Gail F. Ross, I. C. Norcom High School, Portsmouth, Virginia.

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EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Courts and Court Procedures:				
1. Develops an awareness of the court system within the jurisdiction in which working.	X	X		
2. Develops an interest in the different types of courts.	X	X		
3. Develops an interest in the different types of cases which are held in various courts and under what circumstances they may be tried differently.	X	X		
4. Shows a keen interest in each and every client employer must try in court and stands behind employer through each case.	X	X		
5. Maintains an up-to-date record of what is happening and what has happened within the courts, particularly in those cases in which employer's office has been involved.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Professional Attitude:				
1. Supports State and National	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Legal Secretaries Association, via membership, participation, and interest.				
2. Maintains at all times a professional attitude regarding position.	X	X		
3. Remembers that confidential means inside and outside the office in both professional and personal circumstances.	X	X		
4. Displays loyalty above all.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Typewriting and Shorthand:				
1. Types the following from attorneys direct dictation, shorthand notes, transcribing machine, handwritten rough drafts, corrected copies, and data compiled by student-learner:				
a. legal instruments such as contracts, wills, powers of attorney, bankruptcy petitions, auto negligence, etc.	X	X		
b. court papers such as compliants, demurrers and interogatives	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
2. Types routine correspondence from rough drafts, dictation, and transcribing machine.	X	X		
3. Receives in-class instruction in court-reporting (acquaintenceship level).		X		
4. Receives in-class instruction in use of Stenograph machine (acquaintenceship level).		X		
5. Performs the duties of any secretary insofar as the care of equipment such as cleaning and other maintenance.	X			
6. Maintains file of all typewritten pleadings in order to be consistent in typing at all times.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Receptionist:				
1. Greets all clients, making them feel as comfortable as possible.		X		
2. Makes appointments for clients	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
3. Displays an attitude of courtesy at all times, regardless of the particular situation.		X		
4. Answers the telephone properly and with interest; takes all messages.		X		
5. Maintains a calendar file to keep employer's appointments in order and on time.	X			
6. Checks court dockets daily to determine whether changes have been made since the day before.	X	X		
ADDITIONS AS TRAINING AS REQUIRES				
Filing and Records Management:				
1. Files incoming and copies of outgoing correspondence.		X		
2. Files invoices, bills, receipts, lists, orders, statistical data, minutes, reports, requisitions.	X	X		
3. Retrieves materials and information from files.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
4. Maintains files on daily court dockets.	X			
5. Files newspaper articles concerning cases in which employer is involved or might be interested for future reference.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Office Management:				
1. Maintains perpetual inventory of supplies used within the office in order to avoid delay of production.	X	X		
2. Keeps supply closet in order so that it can be used more efficiently by all concerned.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Recordkeeping:				
1. Receives and posts customer payments.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
2. Receipts all payments received personally.	X	X		
3. Sends out monthly statements.	X	X		
4. Keeps record of all amounts reimbursed by client so that employer does not pay expenses which should be paid for him.	X	X		
5. Maintains records stipulating exactly who will be responsible for paying what portion of fees and how much such fees will be.	X	X		
6. Collects certain fees as stipulated by employer so that he does not have to bother with trivial fees.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Office Machines:				
1. Adds columns of figures on 10-key adding machine and full-key calculator.		X		
2. Subtracts, divides and multiplies on calculator.		X		

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EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
ADDITIONS AS TRAINING REQUIRES				

INDIVIDUALIZED TRAINING PLAN

Copy: _____

Name James Woody Job Title Mail Clerk

Firm Army Material Command Training Sponsor Mr. Watson

Student's Career Objective Employment with Government

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Reports to Personnel for interview and completing of necessary forms.	X			
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, pension, hospitalization).	X	X		
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations, merit ratings, promotions, emergency numbers for reporting absences, etc.	X			
4. Meets supervisory personnel and office staff.	X			
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, sincerity, and loyalty.	X	X		

Developed by Richard Gochenour, Groveton High School, Alexandria, Virginia.

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.	X	X		
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.	X			
ADDITIONS AS TRAINING REQURIES				
Incoming Mail:				
1. Opens incoming mail immediately upon receipt by letter opener machine.	X	X		
2. Sorts the mail according to offices within directorate, other directorates, or outgoing mail.	X	X		
3. Removes and carefully examines letters and other enclosures, carefully attaching these to the letter.	X	X		
4. Distributes the mail within directorate.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
5. Checks letters for signature and address before discarding envelope.	X	X		
6. Notes omission of any enclosure in margin of the letter.	X			
7. Keeps log of missing enclosures, checks, stamps, cash, etc.	X	X		
8. Does not open personal or confidential mail.	X	X		
9. Sees that Special Delivery and Registered letters do not go out with regular mail.	X			
10. Keeps a register of expected mail and one of Registered, Insured. and Special Delivery received.	X	X		
11. Operates xerox copier to photocopy material to be sent to two or more persons or departments when necessary.	X	X		
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Outgoing Mail:				
1. Collects mail from outgoing boxes/offices at regular intervals.	X			
2. Sorts mail into various classes, departments, etc.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Office Communications:				
1. Takes and records telephone messages.	X	X		
2. Answers inquiries via telephone concerning specific enclosures or pieces of missing mail.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Other:				
1. Makes up confidential Reading File daily.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
2. Routes Reading File to all offices within directorate.	X			
3. Destroys all classified material as directed by using shredding machine--Destroyit Shredding Machine.	X			
4. Delivers messages.	X			
5. Periodically shops at Self-Service Supply Center and picks up selected office supplies--paper, pencils, steno pads, xerox paper, toner, oil, and developer.	X			
6. Assists in preparing of charts, view charts, graphs, and other visual aids.	X	X		
ADDITIONS AS TRAINING REQUIRES				

INDIVIDUALIZED TRAINING PLAN

Copy: _____

Name Ronnie Wiles Job Title Medical Secretary (Trainee)

Firm Doctors J. D. Beale, Jr. and Max Lassiter Training Sponsor Carolyn Kessler

Student's Career Objective Secretary

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Receives explanation of Code of Ethics in medical profession: a. diagnosis b. examinations	X	X		Developed by Ruth S. Blankenship, George Washington High School, Danville, Virginia.
2. Receives information about office system of: a. filing b. billing c. bookkeeping	X			
3. Receives explanation of work schedule and any specific directions on code of dress.	X			
4. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.		X		
5. Tours office facilities and meets co-workers.	X			
6. Examines work area and locates supplies.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
7. Completes work permit forms.	X	X		
8. Completes payroll deduction forms.	X			
ADDITIONS AS TRAINING REQUIRES				
Typewriting and Transcription:				
1. Copies schedule of doctors' on-call work schedule for hospital and answering service.	X			
2. Drafts requests and replies for needed medical information		X		
3. Transcribes and types letters from a dictaphone.	X	X		
4. Selects and types medical information for Medicaid and group insurance forms from medical records.		X		
5. Orders office supplies.		X		
6. Records data on charts.	X			
7. Completes insurance forms to file claims for payment.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
8. Cleans and maintains typewriter--includes changing of carbon and fabric ribbons. ADDITIONS AS TRAINING REQUIRES		X		
Recordkeeping:				
1. Keeps financial records: a. daily record of collections b. patient's accounts c. cashbook	 X X	 X		
2. Administers petty cash fund.	X			
3. Prepares and sends statements to patients.	X			
4. Writes charge slips to accompany patient's chart to the doctor.	X			
5. Posts the charge from this slip as it accompanies chart back to office.	X			
6. Totals the charge slip and extends the transaction to the patient's permanent charge record.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
7. Reconciles the cash balance daily.	X			
8. Registers Emergency Room and home visitations from slip presented by doctor on call the previous night or weekend.	X			
9. Registers charges on patients in hospital.	X	X		
10. Retrieves past-due accounts from the accounts receivable file monthly.		X		
11. Sends past-due notices.	X			
12. Copies statements of account.	X	X		
13. Folds and inserts statements in envelopes.	X			
14. Dispenses charge cards to collector on accounts which are determined uncollectible.		X		
15. Computes payroll deductions.		X		
16. Writes payroll checks.		X		
17. Reconciles bank statements.		X		
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Filing:				
1. Receives explanation of structure and use of files.	X			
2. Obtains names of patient's father to locate previous record on file.	X			
3. Retrieves charts from files on patients with appointments or as registration is accepted.	X			
4. Documents a new chart for new patients.	X			
5. Files charts at intervals during the day and finishes filing of charts by the end of the day.	X			
6. Registers the date of professional service on the patient's chart.		X		
7. Records information in patient files: a. diagnosis b. x-ray reports c. lab reports d. operative reports e. medication/prescriptions f. history	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
ADDITIONS AS TRAINING REQUIRES				
Receptionist Duties:				
1. Greets patients and visitors.	X			
2. Schedules appointments.	X			
3. Keeps appointment book up to date.	X			
ADDITIONS AS TRAINING REQUIRES				
Telephone Duties:				
1. Answers telephone.	X			
2. Routes calls for immediate medical aid to nurse or doctor	X			
3. Uses telephone: a. Obtain result of tests. b. Schedule tests or treatments. c. Arrange hospital admittance. d. Dispatch medical information to hospital or insurance companies.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
ADDITIONS AS TRAINING REQUIRES				
Mail Handling:				
1. Opens, sorts, and distributes incoming mail.		X		
2. Feeds outgoing mail through postage machine.	X			
3. Purchases additional postage as needed.		X		
ADDITIONS AS TRAINING REQUIRES				
Housekeeping Duties:				
1. Straightens waiting room.	X			
2. Straightens doctors' desks.	X			
3. Dusts work area and arranges materials conveniently.	X	X		
ADDITIONS AS TRAINING REQURIES				

INDIVIDUALIZED TRAINING PLAN

Copy: _____

Name Shirley Mae Carter Job Title Secretary (Trainee)

Firm Department of Commerce, U. S. Patent Office Training Sponsor Mrs. Phyllis L. Sisk

Student's Career Objective Secretary

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Receives a brief overview of the agency--policies, procedures and objectives. Role of the agency in the business world, services rendered, types of clients and/or customers served.	X	X		Developed by Bette E. Lamb, Wakefield High School, Arlington, Virginia.
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions (life insurance, retirement, hospitalization).	X	X		
3. Receives explanation of structure of department to which assigned.	X			
4. Receives explanation of employment schedule--breaks, holidays, vacationa, performance award ratings, within-grade increases, promotions.	X	X		
5. Receives information regarding job efficiency-- following	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
standard agency practices, producing work on time, maintaining high degree of quality and quantity when a variety of duties are involving proofreading data.				
6. Receives information about appropriate dress and grooming.	X	X		
7. Receives explanation of the importance of poise, tact, and courtesy.	X	X		
8. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, and loyalty.	X	X		
9. Receives explanation of work flow within the office and the importance of the student's job to total office output.	X			
10. Meets supervisory personnel and office staff.	X			
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Typewriting and Shorthand:				
1. Uses electric typewriter.	X	X		
2. Cleans and maintains typewriter--including changing carbon and fabric ribbons.	X	X		
3. Maintains a supply of shorthand pads, writing instruments and other office materials.	X	X		
4. Scans the material to be typed.	X	X		
5. Assembles materials necessary for production of copy.	X	X		
6. Plans the work for format and placement.	X	X		
7. Uses vocabulary and terminology peculiar to the agency.	X			
8. Types the following from direct dictation, shorthand notes, transcribing machine, handwritten rough drafts, corrected copies, and/or data compiled by student-employee: a. envelopes, cards, and labels. b. spirit, stencil, and offset mats c. statistical reports d. minutes of meetings	X	X		

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EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
e. memoranda f. letters g. reports h. itineraries i. business forms. j. telegrams k. abstracts, summaries l. briefs				
9. Composes and types routine correspondence from instruction or job knowledge.	X	X		
10. Proofs dictated letters.	X	X		
11. Places the final copy in order	X	X		
12. Delivers copy to supervisor for signature.	X			
13. Duplicates final copy of materials for presentation to decision panel.	X			
14. Takes dictation over the telephone.	X			
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Recordkeeping:				
1. Prepares monthly reports.	X			
2. Maintains production records.	X			
3. Consolidates and prepares tabulated production reports of hours worked, cases typed, and total pages of copy produced.	X			
4. Maintains serial number reference data.	X			
ADDITIONS AS TRAINING REQUIRES				
Filing:				
1. Receives explanation of structure and use of filing systems in the office.	X	X		
2. Reads, sorts, and codes materials to be filed.	X			
3. Locates and attaches appropriate file to materials to be acted upon.	X			
4. Files:				
a. incoming correspondence, serial number control cards	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
and other materials b. copies of outgoing correspondence	X			
5. Prepares new file folders when necessary.	X	X		
6. Retrieves materials and information from files.	X	X		
7. Maintains records of materials in file and places endorsement as to the type of correspondence prepared.	X			
8. Traces missing file data.	X			
9. Destroys obsolete file materials or transfers to inactive storage.	X			
10. Replaces worn folders, labels, and index cards.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Communicating with Others:				
1. Smiles and exhibits a positive attitude.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
2. Uses good diction.	X			
3. Greets persons outside the agency and agency personnel.	X			
4. Receives visitors and directs them to appropriate personnel.	X			
5. Receives and gives information.	X			
6. Uses directories, files and references.	X	X		
7. Receives and evaluates information.	X			
8. Handles inquiries or requests.	X			
9. Answers telephone inquiries.	X			
10. Places local and long distance calls.	X			
11. Records telephone messages on appropriate forms with complete data.	X			
12. Delivers telephone messages.	X			
13. Routes calls to persons within the agency.	X			
14. Secures information via telephone.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
15. Cooperates with others in performing office tasks.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Handling Mail:				
1. Handles incoming mail:				
a. receives, date stamps, sorts, and distributes	X			
b. replies to routine mail as directed	X			
2. Prepares outgoing mail:				
a. collects outgoing mail	X			
b. addresses envelopes	X	X		
c. stuffs envelopes	X			
d. wraps packages	X			
e. Uses prepaid government envelopes or affixes postage manually or with postage meter.	X			
f. Fetches mail to be sent to post office	X			
g. separates mail by classification; i.e., U. S. or foreign	X			
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Organizing and Planning:				
1. Arranges itineraries.	X			
2. Makes preparations for meetings.	X			
3. Prepares agenda for meetings.	X			
4. Arranges for training aids, facilities and equipment.	X			
5. Plans own work.	X	X		
6. Reviews and clips newspaper and technical magazine articles.	X			
7. Obtains information from appropriate sources when needed for correspondence.	X			
ADDITIONS AS TRAINING REQUIRES				
Housekeeping:				
1. Maintains orderly desk, files and work area.	X	X		
2. Keeps reception area neat and	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
attractively arranged.				
3. Provides current reading material.	X			
ADDITIONS AS TRAINING REQUIRES				

INDIVIDUALIZED TRAINING PLAN

Copy: _____

Name Judy Huffman Job Title Secretary (Trainee)

Firm Danville School Board Training Sponsor Sandy Stigell

Student's Career Objective Secretarial or related

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Introduce student to central office personnel.	X			
2. Explain general office organization and responsibilities of supervisors.	X			
3. Explain job performance and outline duties and responsibilities of student.	X	X		
4. Explain receptionist duties:				
a. procedure for greeting and assisting callers	X	X		
b. procedure for taking messages and relaying same	X	X		
c. telephone responsibilities, intercom	X	X		
5. Explain work permit rules and regulations; supply study materials.	X	X		
6. Show supply room and demonstrate how requisitions are to be filled out.	X			
7. Explain purpose and use of scrapbook.	X			

Developed by Matt Nelson, George Washington High School, Danville, Virginia

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
8. Explain and demonstrate bookkeeping department duties:				
a. filing procedure	X			
b. purchase orders explained-- ordering and billing	X			
c. miscellaneous	X			
9. Demonstrate and explain postage meter and mailing procedure.	X			
10. Demonstrate mimeograph and copier.	X	X		
11. Assign typing and general office duties as work load varies during orientation: (See Secretarial, General Office Duties for suggested sequence).	X			
ADDITIONS AS TRAINING REQUIRES				
Receptionist, Telephone, Work Permits:				
1. Greets callers, ascertaining wants, directs to appropriate supervisor and/or office.	X	X		
2. Supplies general information to public.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
3. Issues work permits according to State rules and regulations.	X			
4. Answers incoming calls, supplies information, and routes to appropriate supervisor and/or office.	X	X		
5. Records and relays messages.	X	X		
6. Places local and long distance calls.	X	X		
7. Uses intercom for inter-office communication.	X			
8. Makes or verifies appointments on occasion.	X			
ADDITIONS AS TRAINING REQUIRES				
Secretarial, General Office Duties:				
1. Typing and shorthand:				
a. routine correspondence	X	X		
b. typing from rough draft	X	X		
c. composition of replies to routine mail	X	X		
d. statistical and informational reports	X	X		
e. dictation from supervisors	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
2. Reports (Certain reports assigned to student).	X	X		
3. Requisitions:				
a. stockroom	X			
b. record and account	X			
4. Scrapbook--research publications daily	X			
5. Bookkeeping Department Assistant				
a. filing	X	X		
b. coordinating and typing purchase orders/ comparison pricing	X	X		
c. writing checks	X			
d. catalogs record (up-date and keep current prices up-dated)	X			
e. Miscellaneous duties	X			
ADDITIONS AS TRAINING REQUIRES				
Mail:				
1. Outgoing:				
a. collect	X			
b. sort	X			
c. post	X			
2. Incoming:				
a. sort	X			

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EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
b. distribute	X			
c. open and stamp	X			
ADDITIONS AS TRAINING REQUIRES				
Mimeograph and Copier Machines:				
1. Use of each	X	X		
2. Maintenance of mimeograph				
a. cleaning	X	X		
b. inventory supplies	X			
c. ordering supplies	X			
ADDITIONS AS TRAINING REQUIRES				
Equipment used:				
1. Telephone and intercom system	X			
2. Electric typewriter	X	X		
3. Adding machine and calculator	X	X		
4. Postage meter and weight device	X			
5. Collator (on occasion)	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
6. Mimeograph	X	X		
7. Copier	X	X		
8. Paper cutter and paper hole puncher	X	X		
ADDITIONS AS TRAINING REQUIRES				

INDIVIDUALIZED TRAINING PLAN

Copy: _____

Name Carole Reeg Job Title Secretary (Trainee)

Firm Bialek's Medical Arts Supply Training Sponsor Ms. Joan Bialek

Student's Career Objective Secretary with Bialek's

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Job Orientation:				
1. Receives a brief overview of the company--its organization, role in the business community, services rendered, types of customers served.	X			Developed by Doris Ruggera, Annandale High School, Annandale, Virginia
2. Receives basic salary information--payroll period, computation of pay, taxes withheld, payroll deductions.	X			
3. Receives explanation of policies regarding workweek hours, breaks, holidays, vacations.	X			
4. Receives information regarding job efficiency--following standard company practices, producing work on time, maintaining high standards, checking facts and figures.	X	X		
5. Receives information for effective personal relationships--importance of punctuality, dependability, cooperativeness, pleasantness, sincerity, & loyalty.	X	X		

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
6. Receives information about correct company image--dress, grooming, voice, posture, quality of work.	X	X		
7. Receives explanation of work flow within the office and the importance of the student's job to total office output.	X			
8. Meets supervisory personnel and office staff.	X			
ADDITIONS AS TRAINING REQUIRES				
Typewriting and Shorthand:				
1. Types the following from shorthand notes, corrected copies, handwritten rough drafts:				
a. letters	X	X		
b. minutes of meetings	X	X		
c. orders for National Institute of Health and other government agencies	X			
d. advertisement to doctors promoting products	X			
e. list of doctors for mailers	X			
f. price lists	X			
g. envelopes	X	X		

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EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
2. Composes and types routine correspondence.	X	X		
3. Edits letters dictated.	X	X		
ADDITIONS AS TRAINING REQUIRES				
Recordkeeping:				
1. Prepares and sends out invoices.	X	X		
2. Logs in number of products sent to customers.	X			
3. Writes account numbers and bids on file cards.	X			
4. Makes a record of items not sent out yet.	X			
5. Checks "on accounts" (what has already been paid) to see if payment is towards a delinquent account.	X			
ADDITIONS AS TRAINING REQUIRES				

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Filing:				
1. Receives explanation of structure and use of filing systems in the office.	X	X		
2. Reads, codes, and sorts material to be filed.	X	X		
3. Files:				
a. other companies' invoices alphabetically by drug companies	X			
b. copies of doctors' bills numerically by account numbers	X			
c. literature sent to doctors	X			
4. Prepares new folders for doctors' accounts.	X			
ADDITIONS AS TRAINING REQUIRES				
Receptionist:				
1. Greets visitors.	X			
2. Refers callers to appropriate person.	X			
ADDITIONS AS TRAINING REQUIRES				

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EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
Telephone:				
1. Answers telephone inquiries.	X			
2. Directs calls to either the Order Department or the Billing Department or to a specified individual in office.	X			
3. Records messages for the seven salesmen.	X			
4. Relays messages when salesmen call into the office.	X			
ADDITIONS AS TRAINING REQUIRES				
Handling Mail:				
1. Stuffs envelopes containing literature about products.	X			
2. Crosses off undelivered mail from mailing list or finds the correct address.	X			

EXPERIENCES AND TRAINING NEEDED	ON JOB	IN CLASS	ON-JOB EVALUATION	INDIVIDUAL RELATED INSTRUCTION
ADDITIONS AS TRAINING REQUIRES				
Office Machines Operation:				
1. Operates the following machines:				
a. electric typewriter	X	X		
b. xerox machine	X			
c. adding machine	X	X		
ADDITIONS AS TRAINING REQUIRES				
Housekeeping:				
1. Maintains orderly desk, files, and work area.	X	X		
ADDITIONS AS TRAINING REQUIRES				

APPENDIX E

Workshop Participants

ACKNOWLEDGMENTS

We would like to express a special thanks to the coordinators listed below who contributed to the preparation of this guide.

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Portsmouth, VA

Rachel Smith
Clarke Vocational Center
Portsmouth, VA

Hope Harrison
Clarke Vocational Center
Portsmouth, VA

Judy Liles
Manor H. S.
Portsmouth, VA

Lynette Whitley
Norcom H. S.
Portsmouth, VA

Willadean Boyd
Wilson H. S.
Portsmouth, VA

Ruby Brankley
Huguenot H. S.
Richmond, VA

Patricia Burcher
Kennedy H. S.
Richmond, VA

Aliceann Fleming
Maggie Walker H. S.
Richmond, VA

Henrietta Morris
George Wythe H. S.
Richmond, VA

Caryl Solomon
William Fleming H. S.
Roanoke, VA

Mamie Basler
Suffolk H. S.
Suffolk, VA

Mary Leonard
First Colonial H. S.
Virginia Beach, VA

Judith Allen
Kempsville H. S.
Virginia Beach, VA

Lou Jones
Princess Anne H. S.
Virginia Beach, VA

Helen Williams
Norcom H. S.
Portsmouth, VA

Lewis Hudson
Jefferson H. S.
Richmond, VA

Billie Wright
William Fleming H. S.
Roanoke, VA

Don Martin
Cox H. S.
Virginia Beach, VA

Mary Clowe
Handley H. S.
Winchester, VA

Brenda Piland
Lafayette H. S.
Williamsburg, VA

Gail Ross
Norcom H. S.
Portsmouth, VA

Geraldine Story
John Marshall H. S.
Richmond, VA

Sandra Hancock
Jefferson H. S.
Roanoke, VA

Sharon Shevock
Princess Anne H. S.
Virginia Beach, VA

Dee Paine
Manor H. S.
Portsmouth, VA

Mary Underwood
Wilson H. S.
Portsmouth, VA

Barbara Haynes
Maggie Walker H. S.
Richmond, VA

Elizabeth Parker
Bayside H. S.
Virginia Beach, VA

John Gilbert
Waynesboro H. S.
Waynesboro, VA

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